main findings

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Yearbook 2014

The Quality of the Media

Digest: main findings

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Yearbook 2014: The Quality of the Media – Switzerland

What is the purpose of the Yearbook?

The purpose of the Yearbook is to deepen the debate about the quality of the media and to help improve it. It will be a resource for people working in the media, those involved in politics, business or academia and anyone with an interest in media trends and media contents. The Yearbook is based on the long-held view that the quality of democracy depends on the quality of the information communicated to the public by the media. The Yearbook will provide the public with a benchmark for the kind of journalism they wish to be exposed to, the media makers will have a benchmark for the kind of journalism they want to produce and be responsible for, and politicians will gain a feel for how the media world is developing and for the resources available for information-based journalism in Switzerland.

Where can I find the Yearbook and the studies?

The Quality of the Media Yearbook is available both in printed form (ISBN 978-3-7965-3320-4) and as an e-book (ISBN 978-3-7965-3321-1). «Studien Qualität der Medien» («Studies on the Quality of the Media» – SQM) are also published. The series of «Reflexionen Qualität der Medien» («Reflections on the Quality of the Media» – RQM) was launched in 2014 as an adjunct to these studies. While the «Studies» are a window for academic articles, the «Reflections» are articles on developments within the media world and are mainly contributed by those actually working in the media. The Yearbook, the studies and the reflections are available via the fög (www.foeg.uzh.ch) or Schwabe Publishers (www.schwabeverlag.ch). The fög publishes further research and communicates the main findings on www.foeg.uzh.ch on an ongoing basis.

Who is responsible for the Yearbook?

The Yearbook is produced and published by the fög – the Research Institute for the Public Sphere and Society at the University of Zurich (www.foeg.uzh.ch).

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Yearbook 2014 – Quality of the Media: a summary of the key points

The current Yearbook – something of a milestone – marks the fifth edition of this cross-media analysis, which focuses on the financial position, media structures and quality levels associated with information-based journalism in Switzerland. This year, media representatives, consumers and policymakers will discover six significant findings:

I. *Entertainment is outperforming information-based journalism in terms of advertising and sales revenue:* The first things worth pointing out are the tendency of advertising revenue to gravitate towards entertainment offerings – to the detriment of information-based journalism – and the greater willingness of the public to pay for entertainment offerings. The free culture has made many people forget that journalism has a price. Although consumers' budgets for media will increase, the amount spent on information-based journalism will continue to decline.

II. *Reach is marginalising quality as far as journalism is concerned:* The trend towards entertainment is also continuing within information-based journalism. Advertisers are preferring the kinds of print, TV and online offerings which satisfy people's need to be entertained with short pieces of soft news and thereby achieve significant reach. This development is being accentuated by the growth in mobile consumption and the appetite for human interest stories on social networks: soft news accounts for the vast majority of «viral news».

III. *Quality is suffering at the «bottom» because there is no imperative to maintain it and at the «top» because it can no longer be provided:* The means available for diverse and professional information-based journalism are being eroded. This trend is causing an overall decline in the quality of information-based journalism. The big demand for low-quality offerings means there is no need to maintain quality, so it continues to decline; in terms of offerings which aim to provide quality, the first thing to fall away is the level of context provided, followed by the level of topical relevance, due to the pressure of cutting costs, the emphasis on click rates and the pressure for online material to remain up to date. There is no financial dividend for quality – quite the opposite in fact: the free culture is nullifying the economy's fundamental regulatory mechanisms by means of relative prices.

IV. *No let-up in concentration and growing business diversification:* The difficult revenue situation – in terms of encouraging a diverse and professional brand of information-based journalism – is translating via economies of scale into an extraordinary process of concentration, with the diversity on offer contracting accordingly. In this respect, the diversity of online providers is even narrower than in the already significantly shrunken press domain. However, the falling revenue for information-based journalism is only having a limited impact on the revenue of the big publishing houses. Via diversification and exploitation chains these are developing into conglomerates where journalism is only one business among others and has to pay its way alongside more profitable lines of business like online classified ads. Of the big three publishing houses within the Swiss press and online market, only the smallest player – *NZZ-Mediengruppe* – is adopting a brand strategy which attaches priority to journalistic quality. Having said this, the brand is mainly sustained through marketing.

V. *Erosion of the professional culture of journalism:* In order to prop up returns within the information market, and in addition to the incessant rounds of cost-cutting, journalism is experiencing a genuine process of industrialisation and marketing-led control. Production processes are being managed by a content management system (CMS), for which journalists in big newsrooms are producing standardised content; something which is happening increasingly for all channels and for more and more media outlets. The resulting trend among the major houses is seeing the use of these newsrooms achieve economies of scale for more and more offerings, while editorial teams are becoming less important and losing their own section specialisms and cultures as they cede ground to the new factories of all-round journalism. Sitting above these factories, editors-in-chief will increasingly collaborate with marketing departments to funnel the news into their own media outlets. Alongside this works a small band of «elite» writers, whose role is to maintain the media outlets' reputation. In the culture of the profession, whose standards, institutions and self-understanding should act as a bulwark against this trend, there are, admittedly, some more stirrings, but little resistance and reflection have yet been forthcoming. The sector thus hardly sees itself as one with core functions to perform within society, and to a large degree it is standing idly by as its standards are eroded. The result is a weakening of the media in Switzerland politically as much as financially.

VI. *Loss of diversity and changes in terms both of the attention paid to topics and players and of agenda building:* With the profession itself virtually unable to slow current trends, driven as they are by falling revenue and efforts to optimise reach, the media arenas within the linguistic regions are seeing changes to agenda building and the attention paid to the various topics and players. Issues which were once the preserve of tabloid journalism are now also being picked up by those media outlets which aim to provide quality; such topics turn into short-lived «media hypes», which then dominate the entire media arena. With high-quality outlets no longer distancing themselves from the topics dealt with by the tabloids, the agendas of the various outlets are starting to converge. In terms of politics, the attention given to political players and topics is also increasingly obeying the rule that reach determines what is newsworthy. Gone are the days of «slowly drilling through hard boards», as Max Weber once described the politician's role. Accordingly, the players and topics paid the most attention are those who are seen to be the most provocative and lend themselves to a moralising-emotive approach. A media system under orders to achieve reach presents us with a different kind of world and a different kind of Switzerland: a polarised, biased place.

How is quality to be understood?

The Yearbook is oriented towards what information-based journalism itself understands by quality. This understanding can be traced back to enlightened liberalism and has expressed itself subsequently in claims to universality, relevance, balance and a pursuit of objectivity in public discourse.

These claims are reflected in the modern quality standards of «diversity» and «relevance», the related concept of «topicality» and in the key requirements in terms of the «professionalism» of journalistic work (rationality, editorial input, transparency of sources). They are also reflected in the statutory regulations regarding public communication, particularly the requirements applicable to public broadcasters, in the general principles pertaining to journalism, in editorial guidelines, in the articles of association of media councils, in the expectations of the public and in the quality analyses provided by those working in the social sciences.

I. Entertainment is outperforming information-based journalism in terms of advertising and sales revenue

In addition to the ongoing exodus of advertising revenue to players outside the journalism sector (search engines, technology firms, online classified ads, social networks) (see chapter I: «Media arena»), advertising revenue within the media system is gravitating towards entertainment offerings and platforms which benefit from advertising and/or sales revenue. This trend is being amplified by the free culture within information-based journalism: while there is little appetite to pay for information-based journalism, entertainment is being sustained by the public's willingness to pay. The positive financial performance associated with entertainment offerings is underscored by the following four observations:

1. *Foreign advertising slots are dominating the TV advertising market as never before:* There has been a major increase in the gross advertising revenue generated by advertising slots of foreign private providers, which boosted their share of the TV advertising market from 35% in 2002 to just short of 60% in 2013. In comparison, the share of the Swiss TV advertising market achieved by public television fell from 62% in 2002 to 33% in 2013, with a substantial amount of advertising money going to offerings which do nothing to enhance the value of information-based journalism in Switzerland (see diagrams 1 and 2).
2. *In addition, entertainment offerings on private TV in Switzerland do better in terms of advertising revenue than offerings on private TV associated with information-based journalism:* The advertising market's preference for entertainment offerings with no information-based programmes is reflected in how well the corresponding offerings from Swiss private television fare in advertising terms: whilst entertain-

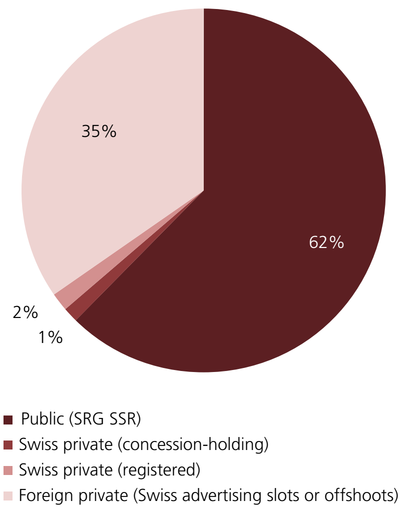


Diagram 1: Gross TV advertising revenue 2002
The diagram shows the shares in gross advertising revenue in 2002 for public broadcasters in Switzerland, concession-holding channels owned by Swiss private broadcasters (details available for *Tele M1* and *Tele 1* only), registered channels owned by Swiss private broadcasters (details available for *3+* and *Tele Züri* only) and for advertising slots or Swiss offshoots of channels owned by foreign broadcasters.
Interpretation example: Public television broadcasters had a 62% share of gross advertising revenue in 2002, while foreign private broadcasters with Swiss advertising slots or channels had a 35% share (data source for gross advertising revenue: Media Focus).

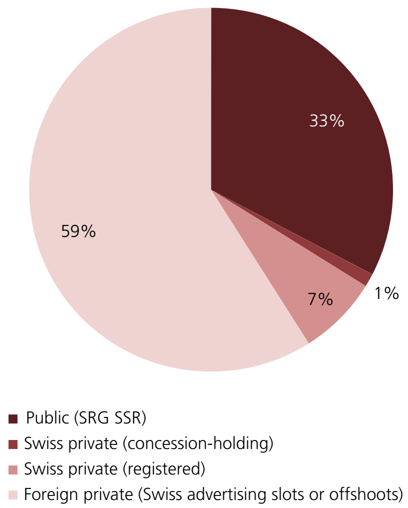


Diagram 2: Gross TV advertising revenue 2013
The diagram shows the shares in gross advertising revenue in 2013 for public broadcasters in Switzerland, concession-holding channels owned by Swiss private broadcasters (details available for *Tele M1* and *Tele 1* only), registered channels owned by Swiss private broadcasters (details available for *3+* and *Tele Züri* only) and for advertising slots or Swiss offshoots of channels owned by foreign broadcasters.
Interpretation example: Public television broadcasters had a 33% share of gross advertising revenue in 2013, while foreign private broadcasters with Swiss advertising slots or channels had a 59% share (data source for gross advertising revenue: Media Focus).

ment channel *3+*, for example, has seen its gross advertising revenue rise to CHF 91 million in 2013 following its launch in 2006, the news broadcaster with public service obligations *Tele M1* was only able to grow its revenue from CHF 5.9 million to CHF 7.4 million during the same period. In Switzerland, public service output hinging on information-based journalism simply cannot compete with purely entertainment-based output in terms of advertising revenue. Consequently, investment within private television is primarily flowing into entertainment offerings (e.g. *Joiz*, *3+*, *4+* and now *5+*), with private broadcasters with information-based offerings relying on support from public licence fees. Unsurprisingly, user behaviour is also reflected in developments of this kind. For example, the user group associated with news-based offerings from private TV in Switzerland and from public radio is «too old» and therefore not so lucrative for the advertising industry: for both, the over-60s are over-represented by more than 30 percentage points, a higher figure than for any other media type (63% of users are 60 or older).

3. *Entertainment is also benefiting from delayed use:* The tendency for entertainment, compared with information, to enjoy financial advantages in respect of the advertising market is being reinforced by the phenomenon of delayed use online, since this inevitably increases the reach of entertainment offerings. At around 25%, the delayed consumption of films, series and children's programmes is considerably higher than for information-based programmes, where the rate of «non-linear» use is only around 10%. In step with the growing prevalence of IPTV – television via broadband –, the rate of delayed use will increase further and entertainment offerings will enjoy competitive advantages in the advertising market because of their reach.
4. *Entertainment is shifting towards new non-linear «pay» platforms, which are marginalising traditional*

linear television: The new market opportunities in the form of broadband, which makes non-linear television available both at home and on the move, are being exploited by players looking to change the landscape within the television business. Major companies such as *Google*, *Samsung* and *Apple*, as well as telecommunications firms and cable network operators, are developing their platforms further or working on ones which satisfy people's appetite for entertainment with films and series on both domestic devices and tablets/PCs, while also incorporating search engines, online classified ads and social networks. As a result, TV consumers are shedding their previous virtual anonymity and will become transparent. Consequently, such platforms are able to strike new seams of advertising gold in the form of comprehensive individual usage data, which minimises the wastage associated with the scattergun approach of traditional advertising. This convergence of television, search engines, online classified ads and social networks on people's home TVs or their computers, smartphones and tablets benefits from the fact that the public is much happier to pay for entertainment than information-based journalism. The free culture within the news sector has rather «devalued» information-based journalism in the public's eyes. While a WEMF survey in 2014 found that no fewer than 57% of those asked are essentially against paying for online papers and magazines, the number of subscribers to platforms such as *Zattoo* or *Wilmaa* or to network operators (e.g. *Swisscom*, *UPC Cablecom*) is increasing significantly. So while households are spending more on media overall, both sales revenue and advertising money are declining for information-based journalism.

II. Reach is marginalising quality as far as journalism is concerned

The trend for entertainment to outperform information-based journalism in terms of both advertising money and people's willingness to pay can also be seen within information-based journalism itself. Free online and offline offerings which seek to focus on reach and therefore advertising revenue with a lot of episodic soft news and context are marginalising paid-for offerings which aim to provide quality. As a consequence of this, low-quality offerings are achieving ever-greater penetration within the media arena. The following six observations bear witness to this development:

1. *Switzerland is a country of free papers:* Within just a decade of the launch of *20 Minuten* at the end of 1999, free papers have become some of the biggest press outlets in terms of circulation and reach. Free papers are much more prominent in Switzerland compared with Europe as a whole. In Switzerland, they account for 30% of the total circulation of all newspapers which reach at least 0.5% of the resident population within the various linguistic regions. This is significantly higher than the European average, where free papers account for some 20%. According to data from 2010, Switzerland ranks near the top in terms of the reach of free papers. It occupies third place behind Luxembourg and Iceland, still ahead of the major countries of Western Europe (Bakker 2013, p. 39; see also Lucht/Udris 2013, p. 24). Since then, free papers have established themselves in all the other three linguistic regions and are easily the biggest-circulation daily papers in German-speaking and French-speaking Switzerland. The outlet *20 Minuten* is particularly dominant in the market: this currently reaches some 2.6 million users across Switzerland every day in printed and digital form (see WEMF, Total Audience 2013). In German-speaking Switzerland, *Blick am Abend* also reaches 779,000 users, with *blickamabend.ch* extending this reach considerably. As a result, free papers, online and offline, are even achieving the kind of usage rates enjoyed many years ago by the «old» public broadcasting of the 1970s, which had little pressure from competition. The inroads made by quickly consumable free online and offline offerings, as well as checking the flow of advertising revenue to online and offline subscription papers, are also affecting agenda building within the media arena, with tabloid-style «hypes» becoming more prevalent across the media arena as a whole and changing the opportunities for political players and topics to attract attention (see point VI).
2. *Lion's share of advertising revenue for free offerings versus major losses of advertising for the paid-for press and pressure to increase subscription fees:* Because low-quality media offerings with an emphasis on soft news, entertainment and quickly consumable snippets of news are achieving the greatest reach,

they are being rewarded with above-average levels of advertising revenue. By contrast, medium-quality offerings (primarily regional subscription papers and programmes on public television) and high-quality offerings (primarily national subscription papers) are being punished through lost advertising. This is exacerbating the vicious circle of reach versus quality, something which is evident with free papers. Nearly every third franc of the advertising spent on Switzerland's 45 biggest newspapers goes to 4 free papers (*20 Minuten*, *20 minutes*, *20 minuti* and *Blick am Abend*) as a result of their significant reach, with the other 41 having to split the rest and attempt to fill the hole created by missing advertising revenue through higher purchase prices. Both of these circumstances are accelerating the trend of reach over quality.

3. *Free culture thanks to neglected paywalls:* The prominence of the free culture in Switzerland is evident not just in the relative dominance of free papers, but also in how very slow the Swiss information market has been to introduce paywalls for online offerings. In 2013 alone, the number of newspapers with a paywall increased by 30% in Germany compared with the previous year (currently 56 newspapers), while 450 out of 1,380 newspapers in the USA operate a paywall system (Meera/Russ-Mohl 2013). By comparison, of the 45 daily papers in Switzerland which reach at least 0.5% of the resident population in the linguistic regions, only *Le Temps* and *NZZ* operate a (porous) paywall, while *Tamedia* introduced a paywall for *Tages-Anzeiger* in 2014, which has so far proved to be very porous (persoenlich.com 2014). Right from the start, online consumption of *Le Temps* has remained very low (a coverage rate of 1%), while *NZZ* saw its usage fall by 10% following the introduction of its paywall in 2013.
4. *Low-quality online offerings are growing substantially:* Developments within the online market illustrate the increase in reach enjoyed by low-quality offerings. Emerging as the main beneficiaries of the significant loss of reach experienced by the online portals with an e-mail service *(msn.ch, gmx.ch, bluewin.ch)*, the news sites of the free and tabloid press picked up an impressive 34% new users between 2012 and 2013, while the online outlets of the subscription press only increased user numbers by 11% in comparison. The rate of user growth for news sites offered by higher-quality press outlets *(nzz.ch, Le Temps Online, tagesanzeiger.ch)* is stagnating at a low level (+3%), while *nzz.ch* – as already mentioned following introduction of the paywall – is losing a significant number of users (–10%). The less widespread paywalls are in Switzerland, the higher the price paid by those introducing them will be. Similarly, the greater the loss of reach, the less likely it will be that any paywalls in place will offset this loss of reach in financial terms. The same vicious circle can be seen here too: because soft news offerings in particular are recording big increases in user numbers and thus also higher advertising revenue, resources within information-based journalism are mainly being invested in such sites rather than in professional information-based journalism. Diagram 3 illustrates this development by showing how

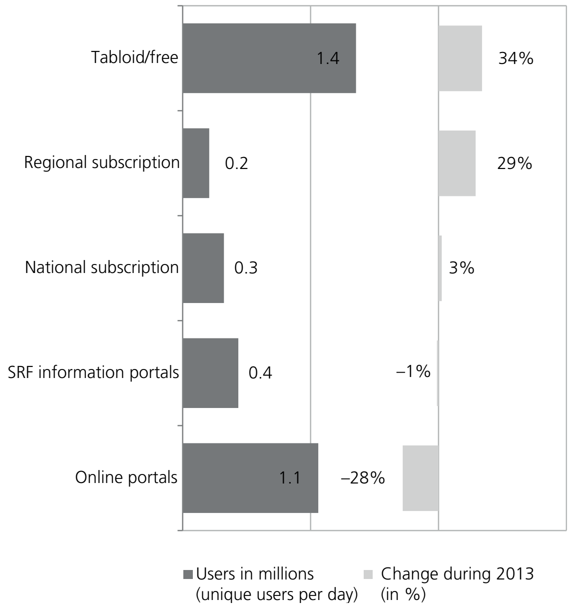


Diagram 3: Online – users and changes in user numbers broken down by type

For the individual online types, the diagram shows the absolute user numbers in 2013 (dark-grey bars). The data is based on all news sites which cover at least 0.5% of the population in the linguistic regions. The light-grey bars show how user numbers have changed since 2012 in percentage terms.

Interpretation example: The tabloid and free media news sites had the most users with 1.4 million, a 34% increase on the previous year.

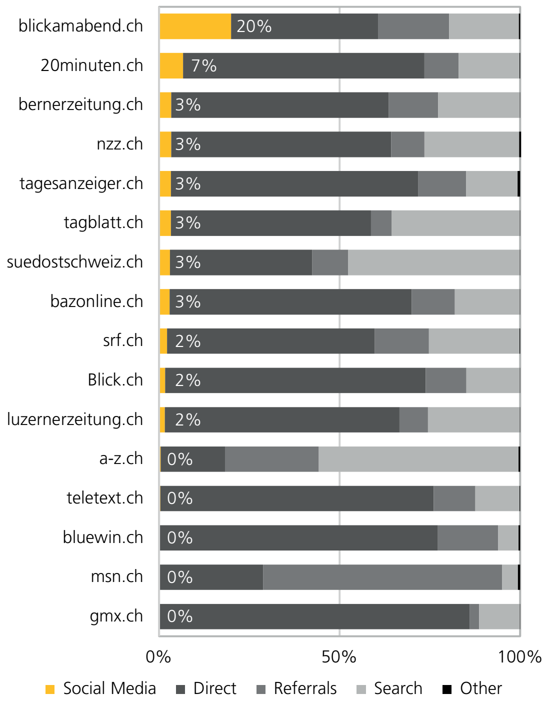


Diagram 4: Significance of social media in terms of news site traffic
For the individual news sites, the diagram shows the channels via which a user accesses the relevant information offering (source: SimilarWeb).
Interpretation example: With *blickamabend.ch*, users were directed via posts circulated within social networks in some 20% of all cases.

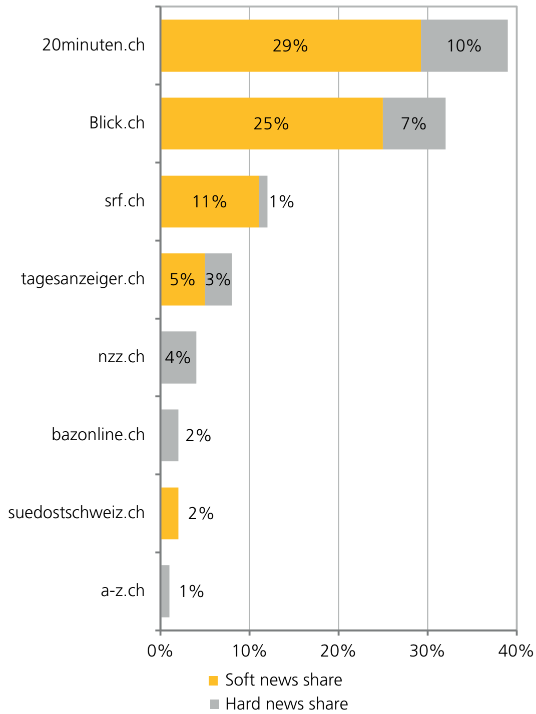
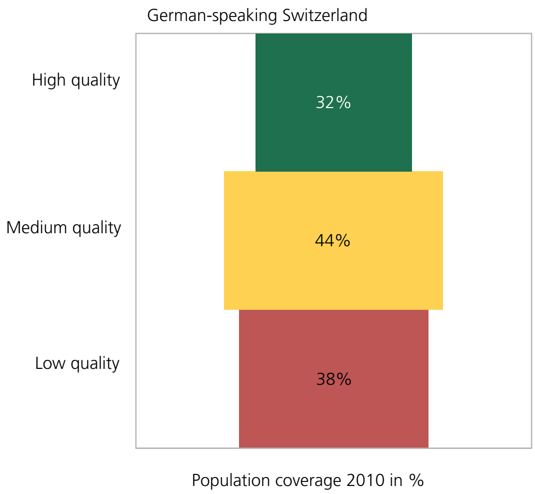


Diagram 5: Virality
For 2013, the diagram shows those media outlets whose stories were often disseminated across social media. A distinction is made between stories with hard news content and those with soft news content. The data is based on the 100 stories from 2013 that went viral most prevalently (source: Themenpuls.ch).
Interpretation example: 20minuten.ch accounted for 39% of the 100 stories that went viral most prevalently. Most of these were soft news stories (yellow bar).

usage rates have changed for the various online types. In addition to the growth enjoyed by the news sites of regional subscription papers, another dominant factor is the growth experienced by online tabloid offerings and free online offerings.

5. *Social networks prefer soft news:* The emphasis on click rates, the pressure to remain up to date and the focus on mobile consumption are eroding quality as far as the various online offerings are concerned. With soft news generating more clicks than hard news, the accelerating pace of online journalism leaving less time to provide any context, and brief snippets of entertainment news given an additional push on mobile devices, the gulf in quality between online outlets and their press counterparts is growing. It is increasingly rare for online offerings to show the kind of journalistic quality that would be expected from the relevant newspaper brands. This is also a result of the tendency for social networks to prefer soft news for the most part. Peer groups within social networks mainly adopt a collaborative approach to communication, designed to promote self-expression and attract as much attention or garner as many «likes» as possible. Collaborative communication is associated with less self-control, a more pronounced moralising-emotive outlook, a predilection for entertaining and scandalous content and a high degree of personalisation (Imhof 2014). In addition, the strong growth in mobile use of social networks and online offerings is favouring quickly consumable short reports and ultra-short snippets of the kind that can go viral.



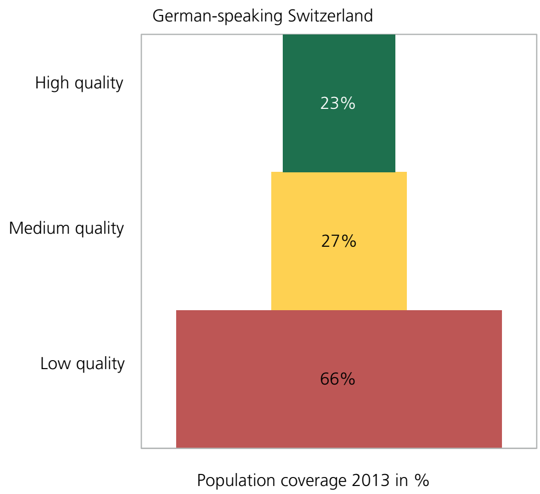


Diagram 6: Quality pyramids for 2010 and 2013 – German-speaking Switzerland

The diagram shows how the coverage of the population by the most important German-language media outlets associated with low, medium and high quality has changed (source: WEMF for distribution/circulation, weighted values; usage figures from NET-Metrix and Mediapulse). Data set used for quality classification: all German-language news stories from the analysis of front pages and lead stories that were sourced on the basis of random samples during 2010 and 2013. A new measurement method has been used for television usage figures since 2013, which is why the TV share in the diagram is shown in light yellow or light red.

Interpretation example: In 2010, low-quality media outlets were reaching 38% (including TV) of the population in German-speaking Switzerland. Three years later, media outlets of a similarly low quality were reaching as much as some 66% (including TV) of the population.

A look at access from social networks to online news sites reveals firstly that low-quality offerings with significant emphasis on episodic soft news journalism are benefiting the most: by way of example, *blickamabend.ch* accounts for 20% of access via social networks, while direct access to the news site only occurs in around 40% of cases (see diagram 4). Virality is even more important for *watson.ch* (figures for *watson.ch* for 2014; all other values are for 2013): around 30% of the news site's users access the site via social networks (compared with a direct access figure of 47%). Secondly, it mainly tends to be news site stories containing soft news which go viral: 72% of the 100 stories which were most often disseminated across social networks during 2013 (source: Themenpuls.ch) were soft news stories with an entertainment slant; only 28% of the stories related to hard news content (see diagram 5). The more online journalism focuses on virality rates, the greater is its inclination to offer soft news. The high demand from social networks for human interest stories is therefore creating another competitor for hard news journalism. Journalism with an emphasis on virality is becoming something of a hawker's tray for social networks. It is dispensing with any agenda of its own in favour of offerings for communities primarily interested in entertainment, whose members consume journalism piecemeal in the form of individual articles.

6. *Dominance of low-quality offerings within the information market – free media as the new «integration media»:* The free culture, offline and online, and the emphasis on click rates and virality have meant that, in Switzerland, a reach strategy based on free offerings, because of its advertising revenue, is now more lucrative than a strategy founded on selling information-based journalism with journalistic quality standards. One example of this is how low-quality media in German-speaking Switzerland were able to increase their coverage of the resident population from 38% to 66% between 2010 and 2013 alone (!), while the coverage achieved by information-based journalism offerings of medium quality (particularly regional subscription papers and public television programmes) decreased over these four years from 44% to 27% and that achieved by high-quality

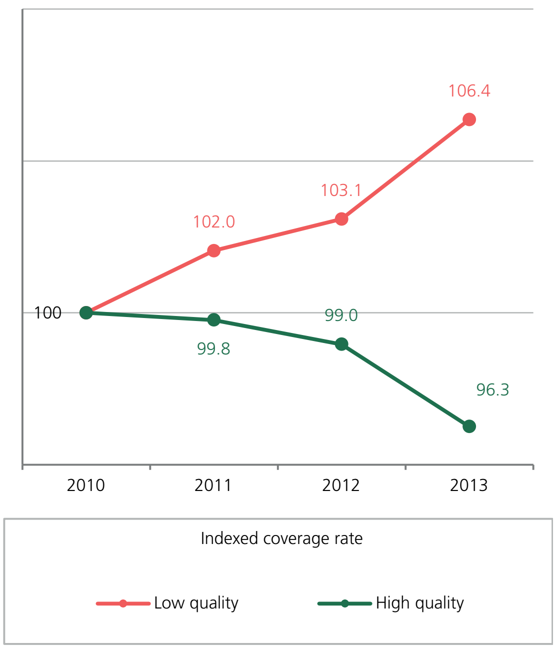


Diagram 7: Highest- versus lowest-quality media – indexed coverage rate

The diagram shows how the coverage of the population by the media outlets (excluding television) from the segments associated with the highest and lowest quality changed across Switzerland between 2010 and 2013. The values were indexed (100) and then plotted as changes in percentage points. Data set used for quality classification: all news stories from the analysis of front pages and lead stories that were sourced on the basis of random samples during 2010, 2011, 2012 and 2013 (source: WEMF for distribution/circulation, weighted values; usage figures from NET-Metrix and Mediapulse).

Interpretation example: The coverage rate for media from the segment associated with the highest quality fell by 2.7 percentage points to 96.3% of the initial indexed value between 2012 and 2013. The coverage achieved by the online media form thus declined by 3.7 percentage points compared with 2010.

offerings (particularly national subscription papers and public radio programmes) decreased from 32% to 23% (see diagram 6). Those offering quickly consumable low-quality soft news and episodic short reports with little editorial input for free are being rewarded with significant reach, while quality journalism is seeing its reach stall or even shrink. The use of low-quality free media online and offline has now become the norm in society. Particularly among younger groups up to age 34, the consumption of this media type has become widespread across all levels of income and education. As well as becoming the offering which reaches the most users, the free paper media type now also achieves the most representative population coverage alongside subscription papers in terms of levels of income and education. Free papers have therefore developed, besides public broadcasting, into the most significant integration medium in Switzerland in terms of both reach and the characteristics of stratification. Today therefore, any co-orientation within the Swiss media is mainly the product of low-quality free media. This success achieved through the reach driven by free offerings has transformed the media arenas within Switzerland's linguistic regions in no time at all. Whereas outlets which aim to provide quality, such as subscription papers and news programmes on public broadcasting, dominated by some margin up to the start of the new millennium and the low-quality segment occupied a clearly defined tabloid niche, the situation has now reversed.

If we illustrate this trend – i.e. for reach to marginalise quality – across five quality strata as opposed to three, apply it to Switzerland as a whole and only show the offerings associated with the lowest and highest quality, we have something which shows the coverage rate for both these media samples from 2010 onwards (see diagram 7). With regard to information-based journalism, which is relevant as far as democracy is concerned, it can be seen that offerings associated with the highest quality are continuously losing reach, while that of the lowest-quality media is continuously increasing. The only small consolation is that the former is happening somewhat more slowly than the latter.

III. Quality is suffering at the «bottom» because there is no imperative to maintain it and at the «top» because it can no longer be provided

If one were to extrapolate this development of reach marginalising quality – unhindered by any media policy measures – on the basis of the three-level quality pyramid shown above (increase in population coverage achieved by low-quality offerings over four years from 38% to 66%), it would become clear that the medium-quality segment of the pyramid, for which reporting in the form of online and offline subscrip-

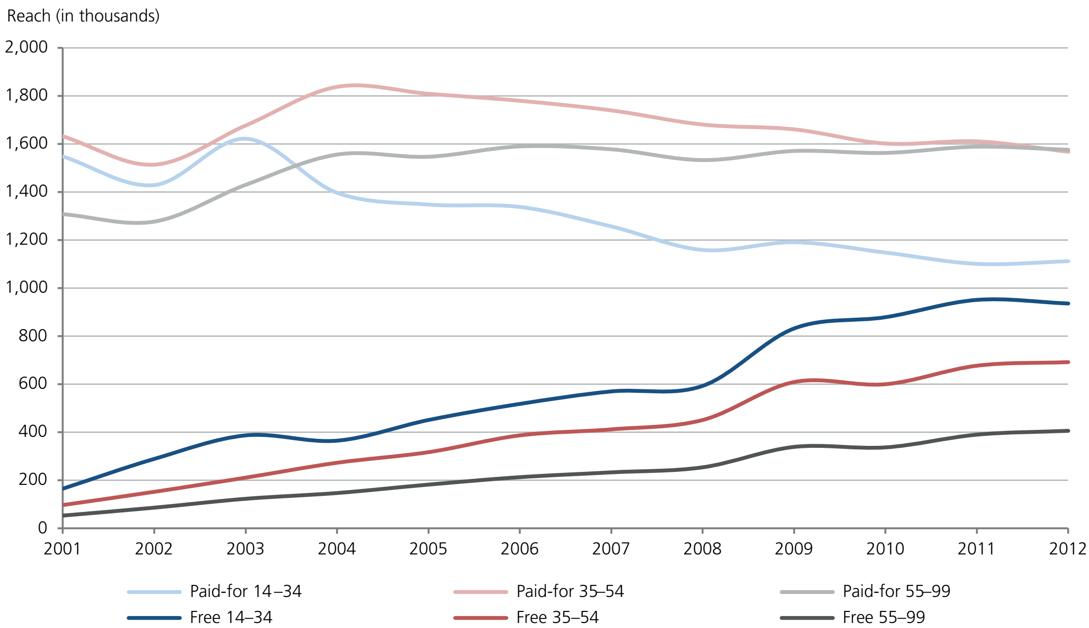


Diagram 8: Press – developments in terms of reach broken down by age group, paid-for versus free offerings
The diagram shows developments for the years 2001–2012 in terms of cumulative reach (in thousands of users) for free and paid-for offerings from the press media form broken down by age group (source: WEMF Mach Basic). All media meeting the recording criteria (0.5% population coverage) and appearing on a daily basis during 2013 were taken into account (excluding the Sunday/magazine media type).
Interpretation example: The reach achieved by free offerings has increased across all age groups since 2005 and was highest for users aged 14 to 35 in 2012 (936,000).

tion papers within the various cantons is the mainstay, will continue to melt away and that the high-quality segment will only be associated with consumption by increasingly older users over 60 and those with the highest levels of income and education. The hope that consumption of free online and offline media by teenagers and young adults would see them graduate in time to better classes of information media has not been fulfilled. Conversely, the accommodation thesis, or force of habit in other words, appears much more plausible, with the next highest age group (35+) also turning its back on paid-for journalism. Diagram 8 substantiates this theory: in the period since 2004, the time when free papers started to join the ranks of press offerings with the greatest reach (2004 is when *20 Minuten* first became the most widely read newspaper in Switzerland), the figures indicating the reach achieved by paid-for papers have been in continuous decline among both the youngest (14–34 years of age) and next youngest age groups (35–54 years of age). During the period prior to that, the paid-for papers managed, albeit temporarily, to increase their reach among the younger age groups too.

Users only tend to deviate from their habits of free consumption when extraordinary events occur. Figures show that the use of relative prices to regulate the media system has been nullified by the consumption of free media. Ordinarily, markets are regulated on the basis of relative prices which bear some relation to the quality on offer. However, as the price approaches zero, this most fundamental form of regulation no longer applies, quality becomes devalued and the public's awareness of the price and value of information-based journalism starts to erode. For a democracy, whose very existence is contingent on a community of rights and laws populated by informed citizens, this development becomes a fundamental problem if the market is flooded with free low-quality online and offline offerings and there is no longer space to thrive for a diverse and professional brand of information-based journalism that enables decisions to be made which affect everyone. Propelled by the ongoing decline in advertising revenue, this tipping point has already been reached within the Swiss media system: there is no longer any financial dividend for quality. A particular case in point is the subscription paper, which continues to reflect most diversely the political, economic and cultural scene across all three levels of the federal system. Quality is declining in step with revenue. This correlation can be illustrated by the five points outlined below:

1. *Diminishing press revenue:* Revenue from both paid-for subscriptions and advertising – traditionally the two main sources of press revenue – is continuing to decline significantly. This is hitting the subscription press particularly hard. Within the space of just a year, from 2012 to 2013, the subscription press outlets recorded lost no less than 10% of their gross advertising revenue (CHF –54.5 million), much more than the paid-for tabloid press. By comparison, the 2% losses suffered by the Sunday press (CHF –2.7 million) were less severe. Despite the decline in gross revenue achieved by free papers (which began in 2011), they have been the clear winners over the last ten years in the wake of this revolution. While free papers still only made up 6% of gross advertising revenue for all print media outlets recorded in 2003, this had increased to almost a third by 2013. Four free outlets – *20 Minuten*, *20 minutes* and *20 minuti (Tamedia AG)*, as well as *Blick am Abend (Ringier AG)* – accounted in 2013 for no less than 29% of the (gross) advertising volume for all 45 press outlets which cover at least 0.5% of the population in the linguistic regions. By way of comparison, the 28 subscription press outlets combined accounted for 46% of gross advertising revenue for 2013.
2. *Online revenue is negligible compared with the advertising lost by the press:* The profits made in the online advertising market do not even come close to making up for the advertising lost in the press market. Compare the mere CHF 8 million (estimated profit) for the online information media with the CHF 91 million loss of advertising revenue (gross advertising revenue) sustained by the press (see chapter IV: «Online» in this regard). This bears out the assumption (there are no publicly available figures) that, here too, the low-quality offerings achieving the greatest reach are benefiting the most. Even though the online advertising market continues to grow, it still only accounts for 9% of the overall advertising market in Switzerland. The revenue for this market is mainly going to providers from outside the sector. By far the greatest profits were again achieved by the search engine sector, which grew by CHF 40 million to around CHF 250 million between 2012 and 2013.
3. *Contractions in scope and less editorial input:* The bloodletting taking place at subscription papers in terms of the financing of information-based journalism is illustrated, among other things, by the fact that, with most outlets, both the scope of their individual editions and the percentage of news stories with editorial input have reduced by some 3% compared with the previous year. In a climate where print journalism is finding it difficult to source financing, substantial gains are typically only being seen at outlets able to take advantage of significant synergy effects (*Tribune de Genève* and *24 heures*, which share a number of sections; *Schweiz am Sonntag*, a merging of *Der Sonntag* and *Südostschweiz am Sonntag*). It is important to remember, however, that these collaborations and mergers reduce diversity.
4. *Significant gap in quality for newspapers:* Those press types and outlets whose complete editions (still) involve comprehensive hard news reporting produced across clearly differentiated sections by specialist journalists are also at the upper end of the quality spectrum in terms of their front page stories (see diagram 9). Leading the field are the national subscription papers *NZZ* and *Le Temps*, *Tages-Anzeiger* and the magazine *L'Hebdo*, as well as the Sunday paper *NZZ am Sonntag*. Excluding these media outlets, it can be seen that key sections (e.g. world news, business or culture) have largely disappeared from a number of subscription papers or are mainly filled by agency reports. This is particularly noticeable with *Berner Zeitung*. Sunday papers and magazines have well-staffed key sections and do provide hard news reporting by editorial staff; at the same time, however, Sunday papers are increasingly devoting a greater share of their journalistic resources to supplements with a soft news flavour. The very bottom of the quality pyramid is occupied by tabloid and

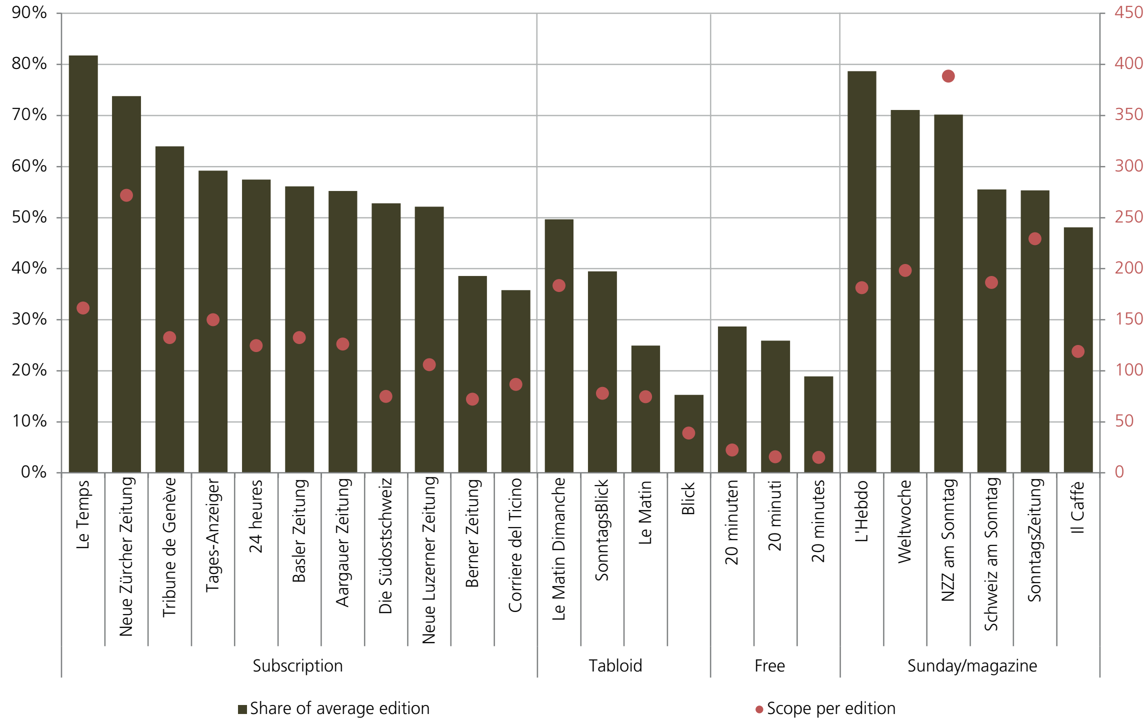


Diagram 9: Press – extent of hard news stories with editorial input declared

For 2013, the diagram shows the extent of hard news stories about politics, business and culture actually labelled as editorial input. The columns show in percentage terms how much of the overall volume of an average edition was taken up by such stories. The dots indicate the scope of such stories in absolute terms (number of characters in thousands) in an average edition. The diagram is based on all stories from the weekly random sample for 7 to 12 October 2013 and two-day random samples from 6/13 and 10/17 October 2013 (n = 11,366).

Interpretation example: Hard news stories labelled as editorial input accounted for 82% of the volume of an average edition of the newspaper *Le Temps*. The absolute scope of such stories was around 160,000 characters per edition, which was lower than for *NZZ* but higher than for *Tages-Anzeiger.*

free papers. Although free papers appear at first sight to contain a greater amount of hard news than tabloid papers (e.g. *20 minutes*: 40% in a single edition; *Le Matin*: 30%), the hard news features in free papers are more often than not just rewrites of agency reports. The percentage of hard news stories with editorial input has declined to 19% for *20 minutes*, compared with the tabloid paper *Le Matin*, which still manages 25%. Free papers, with their short length, offer the least hard news with editorial input in absolute terms. One example would be *20 minutes* with 15,000 characters, some five times less than *Le Matin*, eight times less than *24 heures* and eleven times less than *Le Temps*.

5. *The trend of declining quality is becoming entrenched within the Swiss media arena:* The overall quality score has been falling continuously since 2010. It decreased in the four years 2010–2013 to 3.9 points, the lowest level measured thus far (for how to interpret the scoring system, see the box). This negative development in quality terms is mainly attributable to the reduction in the level of context provided. The score for provision of context fell significantly between 2010 and 2013 by almost 0.5 points to the lowest level measured thus far. The relevance of stories (the balance between hard news and soft news) bears the next greatest responsibility for this drop in quality (following an increase in quality in this particular area between 2010 and 2011 as a result of the greater intensity of hard news associated with the «Arab Spring» and the federal elections in Switzerland). The more resources are stripped away from information-based journalism and news production becomes tailored to mobile users with the emphasis

on virality, the greater the significance of news snippets, which are cheaper and quicker to produce, and soft news. This effect is also reinforced by the greater prominence enjoyed by short-lived «hypes» with moralising-emotive overtones across all quality levels within the media arena (see section VI).

Quality scores and differences between scores – how are these to be interpreted?

The quality scores recorded can range from 0 (very poor quality) to 10 (very good quality). These minimum/maximum values are purely notional, however.

At 2.5, the lowest quality score ever measured at the media type level was given to tabloid online in 2013. The highest quality score ever measured is 5.8 and was awarded to public radio in 2011. So far then, the quality measured varies within a range between 2.5 and 5.8 points. This equates to a maximum quality difference to date of 3.3 points between the media types with the highest and lowest score.

The spread between the lowest and highest scores is wider at the level of individual media outlets. The highest quality score ever measured was the 6.3 points achieved by the public radio outlet *Echo der Zeit* (SRF) in 2011. The 2.2 handed to *Blick.ch* in 2012 is the lowest score to date. At the level of individual outlets, the widest quality difference measured thus far between media outlets with the highest and lowest score is therefore 4.1 points.

We interpret statistically significant changes in quality scores year on year on the basis of changes measured during the previous years. The following system is used:

Up to <0.1 point:	minimal change
0.1 to <0.3 point:	slight change in quality
0.3 to <0.5 point:	medium change in quality
Over 0.5 point:	considerable change in quality

Overall, the erosion in quality across the media arenas within Switzerland's linguistic regions is typified by declining quality at both the «top» and «bottom» (see diagram 10). Even media types with above-average quality scores between 2011 and 2013 are also seeing major falls. This is true of public radio, subscription papers, the Sunday papers/magazines type and public television (less provision of context and less relevance). The erosion in quality for the free paper, free online and tabloid online media types, combined with the already very significant and increasing reach of these media types, bears considerable responsibility for the downwards stratification of quality within the Swiss media arena. The free online type in particular has experienced a striking and continuous decline since 2010. The drop in quality here between 2010 and 2013 is a substantial 0.7 point (see the box relating to the scores). As in previous years, the tabloid paper news sites, with their significant reach, are bringing up the rear in terms of quality.

Additional information: socio-demographic profile of press and online users (see diagram 11)

However, free offerings are used to a disproportionately high extent by young age groups, i.e. those aged 14 to 34, a tendency which is even more pronounced online than for the press. Looking at the education and income distribution, this is practically the same for free papers as the average for the (media-using) population. This is testimony to the very significant reach and distribution within society now achieved by free papers across the various levels of education and income.

The national subscription press is read far more often than average by those with a high level of education, who – again more often than average – have a high or very high income. The regional subscription press, by contrast, mirrors the free press by reaching a readership that corresponds to the average in terms of both education and income. This means that regional subscription papers are associated with relatively even distribution across the three levels of education and income, while use of national subscription papers is disproportionately high for an elevated level of education and income. Distribution for the subscription online type is similar to that for the national subscription press. Here too, well-educated users with high incomes are over-represented compared with the media-using population as a whole.

Tabloid papers are the only press type predominantly read by those who left school as soon as they completed their compulsory education. At the same time, the proportion of those with a high level of education admitting to reading tabloid papers is significantly below the average. These differences level out significantly, however, when it comes to income. The tabloid media type may not attract readers across all levels of education, but it does so across all income levels. The tabloid on-

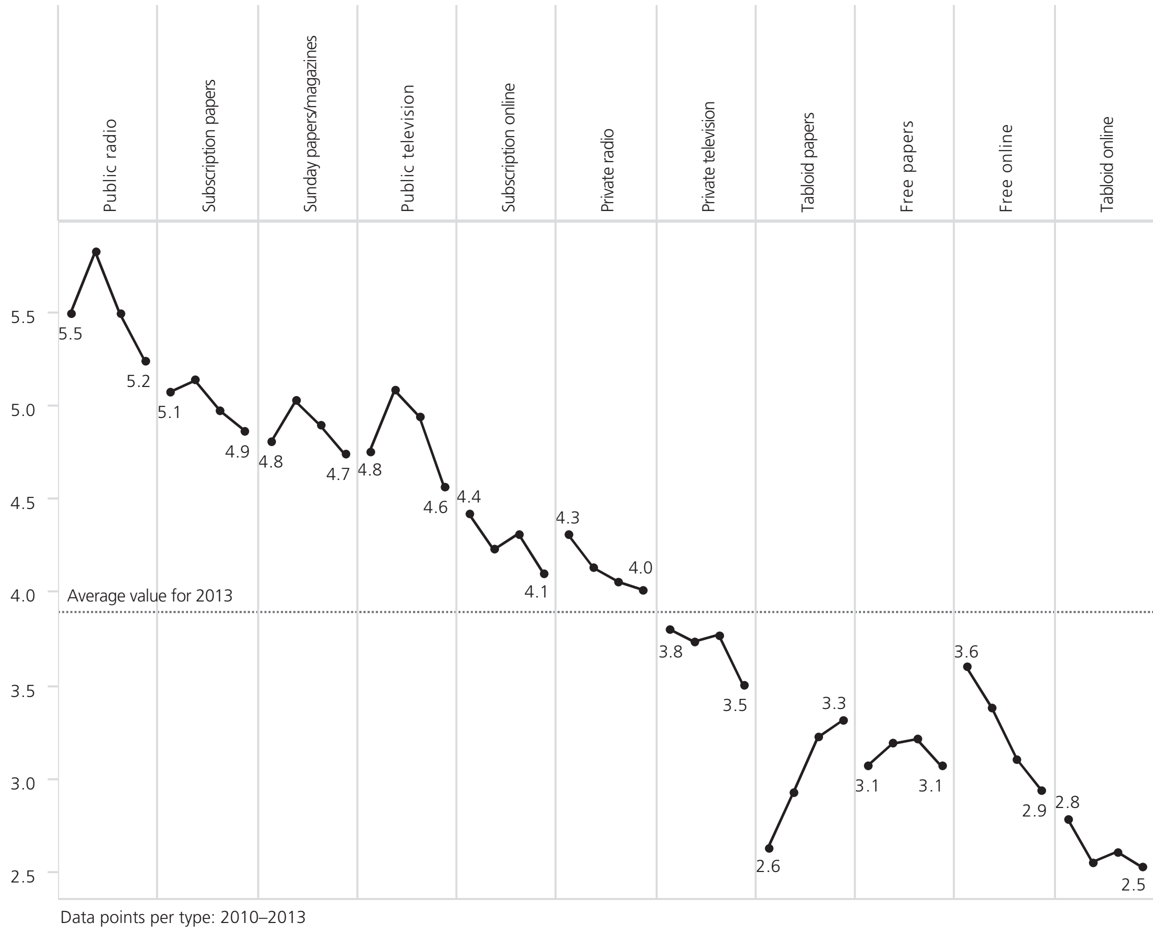


Diagram 10: Changes in terms of quality 2010–2013

The diagram shows the absolute quality scores for the media types from 2010 to 2013. The outlets are listed in descending order based on their quality score for 2013. Data set used for quality classification: all news stories from the analysis of front pages and lead stories that were sourced on the basis of random samples during 2010, 2011, 2012 and 2013 (2010 n = 15,659; 2011 n = 17,092; 2012 n = 18,442; 2013 n = 17,040). The values shown have been rounded to one decimal point.

Interpretation example: Public radio achieved the highest quality score for 2013, although the figure fell to 5.2 compared with the previous year.

line type presents a slightly different picture. Here, the user groups with a high level of education are marginally over-represented.

In terms of the socio-demographic profile of their readers, Sunday papers and magazines (i.e. *Weltwoche*) are similar to national subscription papers. Having said this, neither the well-educated nor high earners are quite so over-represented here.

In summary, national subscription papers may be characterised as elite media, while regional subscription papers and, to an even greater degree, free papers appeal to a wide spread of education and income levels among the population. Tabloid papers may be described as a lower-class medium in terms of the distribution of educational attainment.

IV. No let-up in concentration and growing business diversification

Considered as purely economic goods, the mass media are associated with a range of factors which promote concentration and monopolisation. These include

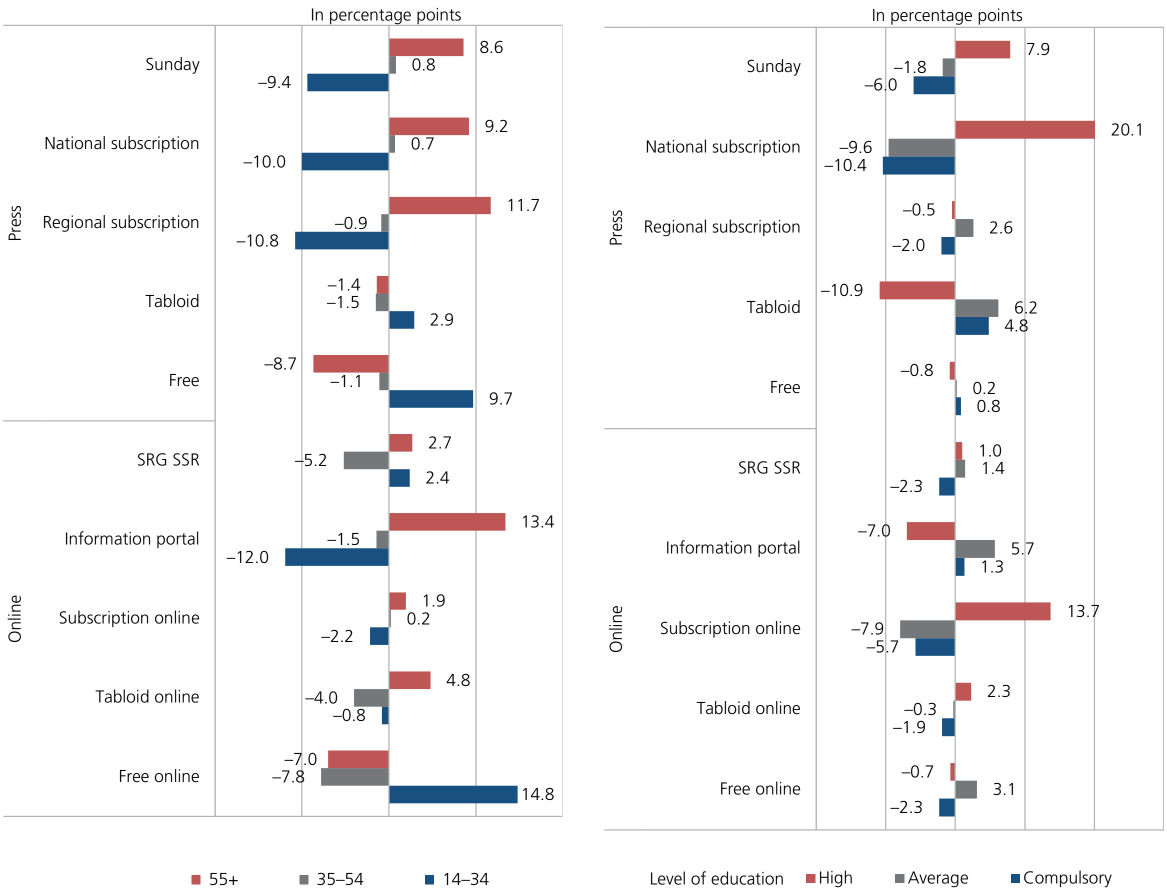


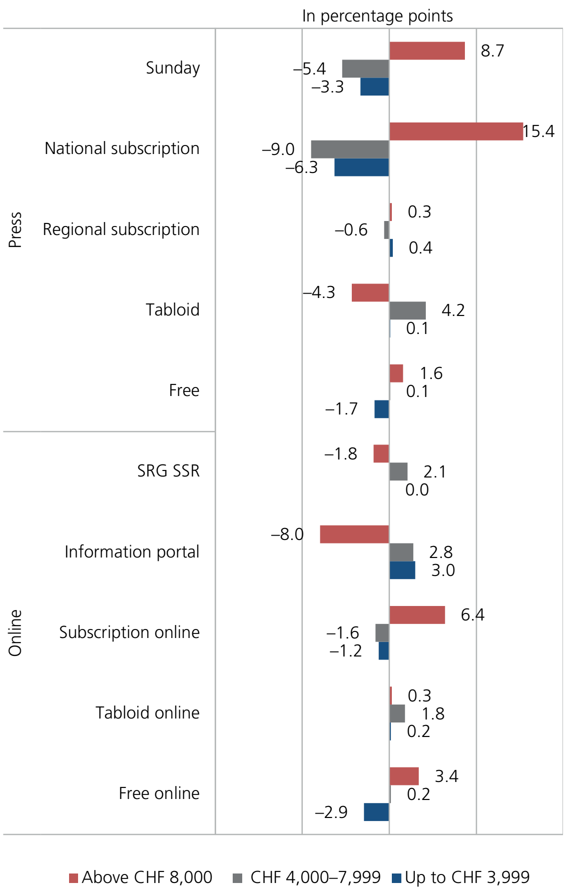
Diagram 11: Usage broken down by age, education and income

For press and online, broken down by media type and the socio-demographic variables of age, education and income, the diagrams show any deviations from the pattern for all media users as a whole for the relevant media form.

Interpretation example: With the free press type, users from the young 14–34 age cohorts were overrepresented compared with all media users of the press media form by almost 10%.

fixed cost degression, which – together with greater appeal to advertisers – rewards those who aim for large numbers of units or significant reach. The more commercialised mass media become, the more they adopt the logic of *economies of scale*, because increasing unit numbers helps recoup production and marketing costs more quickly and facilitates higher profits. Costs can also be optimised through syndication of journalistic products by means of convergence or network systems *(economies of scope)*.

Having said this, mass media are journalistic goods as well as economic ones and are crucially important to safeguarding the essential functions of the public sphere within a democracy. While concentration and monopolisation tendencies make sense from a financial perspective, they are problematic in terms of the diversity and quality of offerings and the opinion-forming process. Concentration and monopolisation reduce the diversity of what the media offer – in terms of both the diversity of independent providers and outlets (external plurality) and – by way of the industrialisation of news production – the diversity and quality of what is offered *within* outlets (internal plurality).



In a federal and multilingual country like Switzerland, the diversity of what is on offer within the (linguistic) regions is also important. This is where another problematic effect of concentration comes to light: Switzerland's three biggest media groups are all based in Zurich. The trend towards concentration in Switzerland can be summarised in three key points:

1. *Globalisation and concentration within the advertising market:* Providers from outside the sector are intensifying competition within the online advertising market and driving the concentration process. The advertising revenue of search engines, largely made up of *Google's* revenue, has enjoyed much faster growth in Switzerland since 2007 (factor of 5.7) than display advertising (factor of 3.6), which is of relevance to information media to some degree. Information media are nowhere near able to offset the losses suffered by the press with this online growth (see point IV.2). Apart from the overall decline in revenue, there is also a concentration of advertising revenue among just a few providers. In 2012 the three major controlling parties accounted for more than 80% in total of overall gross advertising revenue within the press sector. Also, every other franc spent on advertising in German-speaking and French-speaking Switzerland ends up in the hands of *Tamedia AG*.
2. *Increasing concentration within the press and online sector with three players dominating:* Based on the circulation of all high-circulation outlets, the three biggest media publishers, *Tamedia AG*, *NZZ-Mediengruppe* and *Ringier AG*, controlled 78% of the press market and 53% of what is offered online across Switzerland as a whole in 2013 (see diagrams 12 and 13). This means that three out of every four print newspapers with significant reach (and more than one in two of all news sites accessed) are operated by one of the big three media companies. Since 2001 these three dominant organisations within the print sector have increased their market share by no less than 40 percentage points; the growth in the online sector amounts to 21 percentage points since 2010 alone. Overall, the degree of concentration in the online sector is even more pronounced than in the press sector. Both the range of providers and diversity of outlets are narrower than for print. As such, any hopes that the Internet would provide greater diversity have been thoroughly dashed: only the biggest media companies are in a position to operate news sites with any significant reach. The barriers to entry for those wanting an online presence with lots of users in addition to a press outlet are very high. Unlike the press, market concentration has increased a great deal, not least recently. In German-speaking Switzerland, *Tamedia AG*, *Ringier AG* and *NZZ-Mediengruppe* have a combined market share of over 57% in the online sector (2012: 45%). In French-speaking Switzerland, the figure jumped from 34% to as high as 49% between 2012 and 2013.
3. *German-speaking Switzerland setting the trend:* The development is most advanced in German-speaking Switzerland, where the big three publishing houses control 83% of the press market and 57% of the

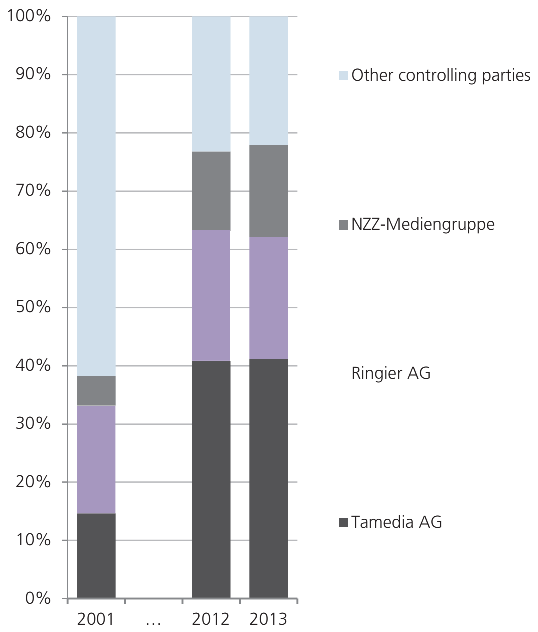


Diagram 12: Concentration within the Swiss press market

The diagram shows how the process of concentration has developed within the Swiss press market for the years 2001 (reference year), 2012 and 2013. The cumulative circulation figures for each year for all the leading Swiss press outlets make up the market as a whole, while the respective share held by the controlling parties determines their market position. The three controlling parties with the greatest market share are shown by name. All press outlets which cover at least 0.5% of the population in the linguistic regions are taken into account (source: WEMF for distribution/circulation, weighted values).

Interpretation example: In 2013, *Tamedia AG*, *NZZ-Mediengruppe* and *Ringier AG* had a 77.9% share of the Swiss press market as a whole. In 2001, this share was a mere 38.2%.

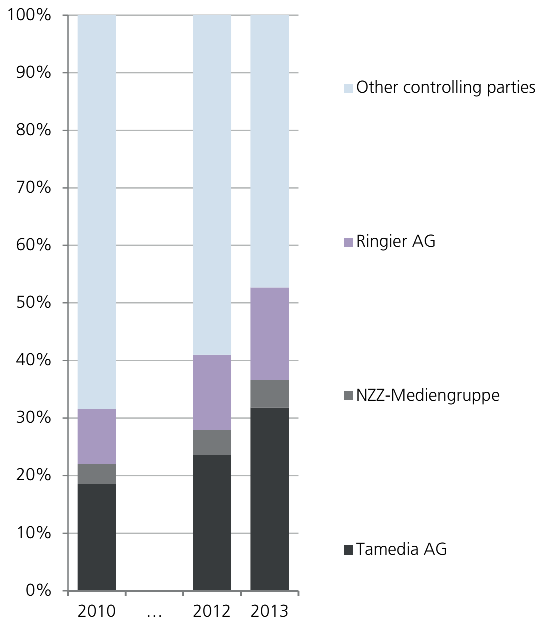


Diagram 13: Concentration within the Swiss online market

The diagram shows how the process of concentration has developed within the Swiss online market for the years 2010 (reference year), 2012 and 2013. The cumulative usage figures (unique users per day) for each year for all the leading Swiss online outlets make up the market as a whole, while the respective share held by the controlling parties determines their market position. The three controlling parties with the greatest market share are shown by name. All online outlets which cover at least 0.5% of the population in the linguistic regions are taken into account (source: NET-Metrix usage figures).

Interpretation example: In 2013, *Tamedia AG*, *NZZ-Mediengruppe* and *Ringier AG* had a 52.7% share of the Swiss online market as a whole. In 2001, this share was a mere 31.6%.

online market. These media groups are also consolidating their coverage areas within German-speaking Switzerland with a view to achieving a monopoly position at regional level which can then be further expanded. In line with this strategy, *Tamedia AG* in 2013 snapped up *Ziegler Druck- und Verlags-AG*, publishers of *Der Landbote* in Winterthur, and also intensified its system used for its regional newspapers for the Zurich area whereby content is shared.

4. *Outside financial influence on the online and press market in French-speaking Switzerland:* The purchase of *Le Temps* by *Ringier AG* has consolidated the position within French-speaking Switzerland of *Ringier AG* and *Tamedia AG*, two media companies from German-speaking Switzerland. The two publishing houses control 73% of the information media within the press market in French-speaking Switzerland and almost half the offerings (48%) in the online sector. This gives *Tamedia AG* alone a 68% market share of the press sector and a 46% share of the online sector. *Hersant SA* from France also has a market presence (press: 11%; online: 2%). Apart from *Swisscom* and *Microsoft* – controlling parties from outside the sector – only a handful of small publishing houses as well as *SRG SSR* are also active in both the press and online market. Consequently, the media market in French-speaking Switzerland – apart from *SRG SSR* – does not have a financial and journalistic counterweight with local roots to oppose the dominance primarily exerted by *Tamedia AG*.

V. Erosion of the professional culture of journalism

Working conditions for journalists have changed markedly, particularly within the print and online sectors. This is true for both media companies and editorial staff. At the corporate level, various press publishing houses have developed into profit-driven multimedia groups and conglomerates with less emphasis internally on the journalistic side of the business. In their efforts to win back the once highly profitable classified advertising business, which was lost with the emergence of the Internet, the preferred approach is to invest in the online classified ads business (e.g. *local.ch*, *homegate.ch*, *autoscout24.ch*). At the same time, a «controller mentality» (Hansi Voigt) with an emphasis on returns has become the main determinant of behaviour. All business areas – including the genuinely journalistic ones – are judged in terms of profit targets and the associated potential for savings, and any financing of journalism from more profitable, non-journalistic business areas is challenged or curtailed. This is regrettable enough in itself, because it means that media companies are taking away journalism's second oldest source of earnings after revenue from actual sales, namely advertising. This reflects the media houses' reduced commitment to journalism.

At the editorial level, there is a convergence of print and online media and a thinning of editorial teams within integrated newsrooms. Closely related to this is the fading distinction between specialist section-based and investigative journalism and that to which it is being forced to give way, namely the new forms of organisation associated with an all-round, multi-channel brand of journalism expected to produce content very quickly. Under the pressure to produce content as rapidly and cheaply as possible, the newsroom at *Ringier AG* supplies several outlets and *Tamedia AG* is also heading in this direction, having *Tages-Anzeiger* collaborate with *SonntagsZeitung* and *20 Minuten*. It is becoming clear that a networked brand of journalism (networked via a content management system, or CMS) represents the future for various outlets and is marginalising the main form of organisation associated with journalistic work, the editorial team. The industrialisation and stratification of the profession will only intensify as a result. Newsrooms are operating as factories for many different outlets managed by editors-in-chief and the marketing department, funnelling output into various outlets in accordance with reach-based criteria. A small band of «elite» writers is retained at the same time, who also continue to manage BuzzFeed derivatives (like *watson.ch*) for reputational reasons. Anyone interested in the sociology of institutions would be struck by how little reflection on and resistance to this development have been forthcoming from journalism as a profession, from the unions and from the centres providing training for journalists. The once-proud profession of journalism, along with its associated institutions, is experiencing a deep uncertainty. The overall result is a weakening of internal regulation within journalism in Switzerland. The change in professional culture can be illustrated in three areas:

1. *Development of press publishing houses into profit-driven multimedia groups and conglomerates with less emphasis on the journalistic side of the business:* The profits of the major media groups in Switzerland – *Tamedia AG* with profits of CHF 119.1 million, *Ringier AG* with profits of CHF 26.5 million; CHF 80.6 million of write-downs and *NZZ-Mediengruppe* with profits of CHF 24.9 million – are increasingly being made with non-journalistic offerings (see diagram 14). At *Tamedia AG*, for example, operating revenue from the Print national (–5,7%) and regional (–3,3%) business areas was down significantly for 2013. By contrast, revenue from the digital business in the form of online classified ads (including *search.ch*, *homegate.ch*) is becoming increasingly important and now accounts for around a quarter of the sales for *Tamedia AG* and *Ringier AG*. Online classified ads are assuming greater significance as strategic investment vehicles and are positioned as independent profit centres. Not only is there no support for information-based journalism from these non-journalistic business areas; information-based journalism is also being devalued because of its inevitable failure to live up to the expectations associated with this purely commercial outlook (see also fög 2012, 2013, p. 53).
2. *Working conditions for journalists – facing up to new challenges as editorial teams converge:* The reality of declining revenue within the advertising and subscription business, while expectations of profit remain high, is seeing the emergence of a two-pronged

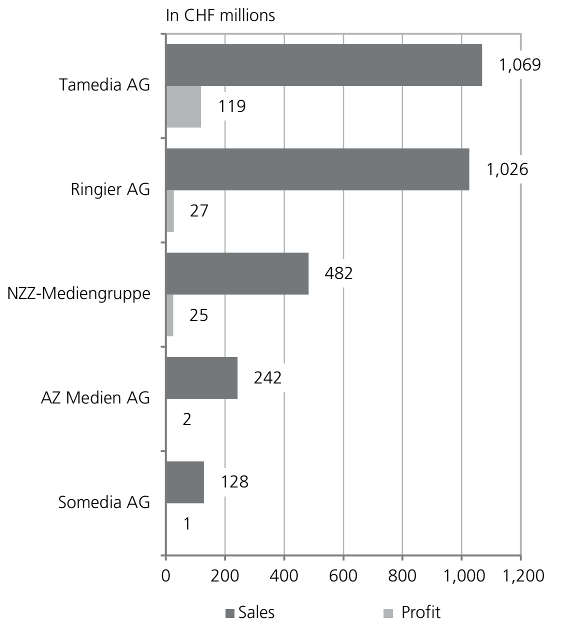


Diagram 14: Media publishing houses – sales and profit

The diagram shows the sales (dark-grey bars) and profit (light-grey bars) in millions of Swiss francs for Switzerland's five biggest private media publishing houses based on 2013 sales figures (source: annual reports from publishing groups).

Interpretation example: Tamedia AG achieved sales of CHF 1,069 million and profit of CHF 119 million in 2013.

strategy based on exploiting new and profitable sources of revenue while reducing costs on the journalism side of the business. To achieve this, editorial teams for print and online media are merged (as is the case with *Tages-Anzeiger* or *NZZ*), sections are pooled across multiple outlets (*Tages-Anzeiger* and *SonntagsZeitung*) and fully integrated newsrooms are operated for all *Blick* outlets. This kind of approach – as evidenced, for example, by the open letter sent by the editors at *Tages-Anzeiger* and related academic studies (Bucher/Schumacher 2008; Keel et al. 2010) – involves a clash of working cultures and conditions. The observable impact on the traditional printed press includes some watering down of the section structures, a weakening of investigative specialisms and a loss of expertise, not to mention increased pressure to remain up to date and maintain production levels and a uniform emphasis on click rates and reach.

3. *Change in the professional profile of journalism:* Convergence and the emphasis on reach – including in terms of social networks and mobile use – are contributing, against a backdrop of diminishing resources, to a metrification of journalism based on measures of success (click and virality rates). This in turn is fundamentally transforming the profile of the profession. At the risk of overstatement, there is a shift from actual content specialists towards specialists in content management systems, generalist providers of content and even native advertising, which at *watson.ch (AZ Medien)* is being produced by journalism personnel, flouting professional standards. An industrialised approach to news production means that soft news content and snippets of news are prepared with an emphasis on day-to-day topicality. This is to the detriment of the journalist's art, with research and the provision of context becoming less important. As a result, journalists are becoming increasingly dissatisfied and engaging (albeit rarely) in protest activities. There is also something of a brain drain towards PR.

VI. Loss of diversity and changes in terms both of the attention paid to topics and players and of agenda building

If we take a long-term view of public communication in Switzerland, it can be seen that reporting philosophies were changing as long ago as the 1980s. This process gathered pace in the 2000s. This phenomenon initially resulted from the way media had been divorced from their origins, in other words the emergence of a commercialised media system. Next came the crisis experienced by business models as advertising revenue was lost, primarily to search engines, online classified ads, social networks, online portals from outside the sector and free offerings with significant reach. The first set of changes, associated with commercialisation of the media, occurred much more abruptly in Switzerland than in other European countries. In these countries, although the media may have begun to divorce themselves earlier from their organisations where they originated (political parties, associations, churches and publishing dynasties with local or regional roots), the process involved took longer overall (Lucht/Udris 2013). In Switzerland, by contrast, it was the party newspapers, as well as public broadcast-

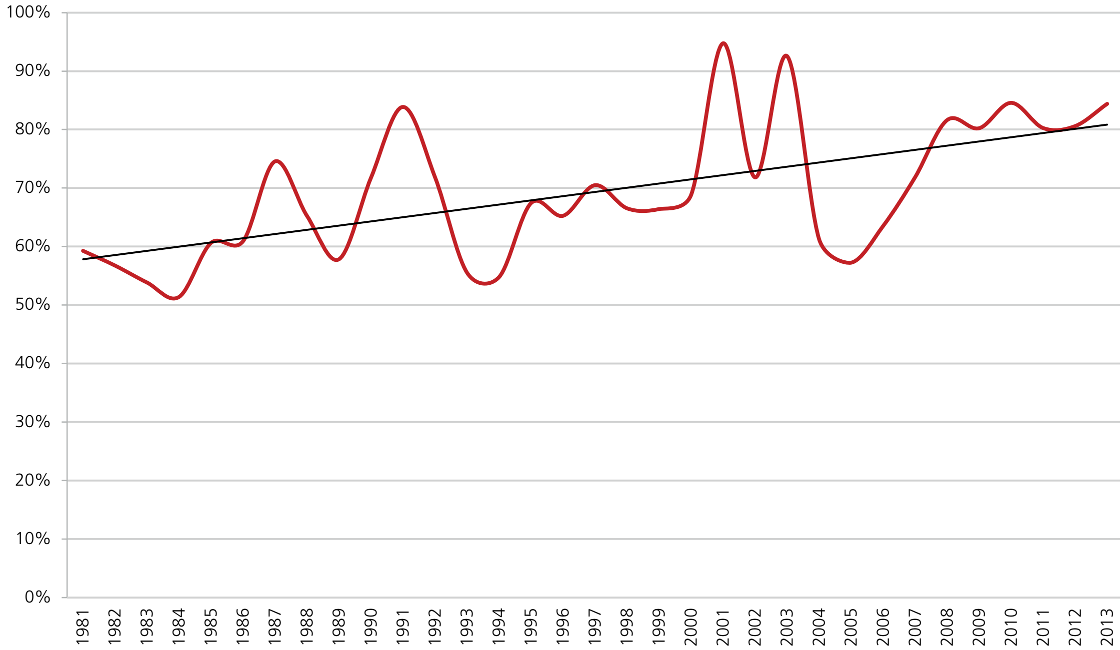


Diagram 15: How the range of topics has developed at *NZZ*, *Tages-Anzeiger* and *Blick*
The diagram shows how the volume of stories has changed for communication events (CEs) featuring among the ten biggest CEs for the respective years in at least two of the three newspapers. Data set used: all stories relating to the top ten CEs for each media outlet and each year between 1981 and 2013 (n = 97,503).
Interpretation example: If there were no overlap between the top ten CEs for each media outlet, the figure would be 0%. By contrast, if coverage of the top ten CEs were identical for each media outlet, the figure would be 100%. In 1981, the average proportion of stories involving some overlap of CEs was 59%, a figure which had risen to 84% by 2013.

ing, which largely dictated agenda building within the media arena both up to and during the 1970s, whereas, for example, the licensed press during the post-war period in Germany was already significantly more divorced from its origins. The extent of this structural change is not the only striking thing about Switzerland: another critical feature which sets the country apart is its free culture, both online and offline, which is a product of the massive proliferation of free media from 1999 onwards (fög 2013, p. 35–80) (see point II). Both these factors – the rapid divorce of the media from their former ties, with the associated shifts in focus, and the crisis affecting business models within the commercialised media – foster a media system in Switzerland which concentrates strongly on reach.

This is illustrated, among other things, by the narrowing of the range of topics dealt with by the whole spectrum of high-circulation information media, whereby a comparison of the ten most important topics reported most widely during the course of a year in *Blick* (a tabloid paper), *Tages-Anzeiger* and *Neue Zürcher Zeitung* reveals that the diversity of topics covered decreased by 25% between 1981 and 2013. This means the tendency for the media to make reference to common media topics has increased by a quarter (see diagram 15).

If we can assume that neither the wider world nor Switzerland has become a quarter «simpler» since the start of the 1980s or after the end of the Cold War, we must look to the transformation of the media, which communicate this world to us on a daily basis, to establish why there is less diversity. The crisis affecting business models is causing the media to focus on reach even more, which is in turn increasing the focus on the most attention-grabbing topics. At the same time, economies of scale are intensifying the process of concentration, resulting in less diversity in terms of both the topics covered and the offerings themselves.

Agenda for high-quality media			Soft news
1	Civil war in Syria	13.31%	3%
2	2013 Bundestag elections in Germany	3.42%	5%
3	KVG health reform	2.88%	6%
4	Murder of social therapist Adeline in Geneva	2.34%	62%
5	Terrorist attack on Nairobi shopping centre	1.98%	0%
6	Global warming/results of academic studies	1.80%	10%
7	«Carlos» case	1.62%	0%
8	Swiss integration policy	1.44%	13%
9	Swiss energy policy	1.44%	0%
10	State of the economy in Switzerland	1.08%	0%

Agenda for low-quality media			Soft news
1	Murder of social therapist Adeline in Geneva	5.83%	82%
2	Civil war in Syria	5.76%	9%
3	Terrorist attack on Nairobi shopping centre	2.07%	19%
4	«Carlos» case	1.94%	53%
5	Football World Cup 2014 in Brazil	1.94%	100%
6	Blick Girls/Star	1.68%	100%
7	Procurement of Gripen planes	1.62%	0%
8	2013 Bundestag elections in Germany	1.55%	17%
9	Swiss integration policy	1.55%	13%
10	Apple: business development	1.49%	4%

Diagram 16: September 2013 – topical agendas associated with high-quality and low-quality media

The tables show the ten biggest communication events (CEs) for all those media outlets belonging to the high-quality (left) and low-quality (right) segments. Those CEs which make up the top ten on both agendas have been highlighted. The tables are based on all news stories from the analysis of front pages and lead stories for the selected media outlets from 1 September to 30 September 2013 (n = 2,100).

Interpretation example: On the agenda of the low-quality media outlets, the murder of the social therapist Adeline as a communication event received the greatest amount of coverage in the month of September (position 1); 5.83% of all reporting was devoted to this CE. The soft news content for this event was 82%.

More evidence of how the range of topics on offer has changed can be found by comparing the frequency of scandal-mongering generally (Imhof 2013) and of short-lived «media hypes» with strong moralising-emotive overtones. First, individual people become the subject of scandals, and then whole situations, before the media arena as a whole becomes saturated. The sheer number of these hypes shows that the traditional distinction is disappearing between the topical agenda of the tabloid media and that of the information media which aim to provide quality. The «Marie», «Amelie» and «Carlos» cases are some examples from 2013, while 2014 has seen the «porn secretary» and the affair involving National Councillor Geri Müller, which became something of a media problem in its own right. Diagram 16 shows how, in reporting terms, the murder of the carer «Adeline» and the «Carlos» case made the top ten communication events paid the most attention during September 2013, and that this was the case for the agendas of both the low-quality and high-quality media. The «Adeline» case even occupied top spot during weeks 38 and 39 in 2013, both across Switzerland as a whole and within the media arenas in the linguistic regions.

This emergence of a heavily reach-driven approach to agenda building across the media arena as a whole is having quite a varied impact on political reporting and can be illustrated in terms of the attention paid to different topics and players. As far as the latter is concerned, a growing emphasis on what is deemed to be newsworthy is seeing a shift in focus towards the executive at the expense of the legislature (Udris 2012). More evidence can be seen in the changing opportunities for political topics and players to attract attention. The topics seeing the greatest media attention are those which consistently exploit any newsworthy areas of potential tension (see Mudde 2007, p. 138ff.; Ettinger 2010). In addition to crime, sex and celebrities, the traditional tabloid press – when it comes to politics – has always lived off a series of opposites: «the people versus the elite», «us versus them» and «friend versus foe». Given the reach-driven tabloidisation of the entire media arena, there is more opportunity for both topics and players to attract attention if the potential tension between these various pairings is exploited in a «media-savvy» manner. Conversely, any other political players and topics with a broader approach to finding a solution – as is the case with the traditional mainstream parties – will fare worse in terms of attention. This correlation can be illustrated by three points as far as 2013 is concerned:

1. *Attention paid to players and issues of the political parties:* As far as communication events relating to Switzerland in 2013 are concerned, the Swiss Peo-

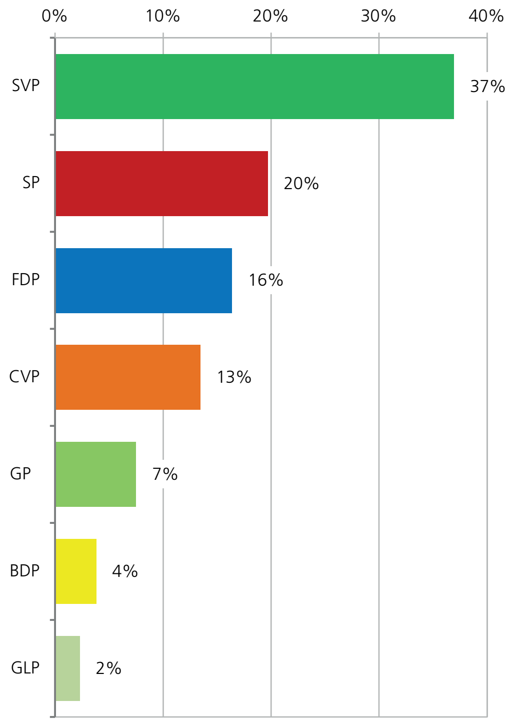


Diagram 17: Attention paid to political parties
For 2013 as a whole, the diagram shows the attention paid to the seven biggest political parties in Switzerland across all communication events with some relation to Switzerland. The investigation focused on the reporting on the front and home pages of 7 media types and 29 press and online outlets from German-speaking and French-speaking Switzerland (see Appendix 1: «Methodology», point 4). A record was made for each story of whether a party was mentioned at least once, i.e. there could be a maximum of seven mentions per story (seven parties). The attention paid to a given party is based on its share of the overall mentions (n = 7,224 mentions); an average figure for the attention paid to the parties was then calculated across the seven media types.
Interpretation example: The Swiss People's Party (SVP) accounted for 37% of all mentions, based on the average for the various media types, with the Green Liberal Party (GLP) accounting for 2%.

ple's Party (SVP) is the most heavily represented ahead of all other parties (see diagram 17). A study of the number of mentions made of political parties in press and online outlets within German-speaking and French-speaking Switzerland reveals that no less than 37% of the attention paid to political parties was devoted to this party, more than both the Socialist Party of Switzerland (SP) (20%) and the Free Democratic Party (FDP) (16%). While the SP and FDP received a level of national attention roughly consistent with their electoral strength (in percentage terms), the SVP is significantly over-represented. There is some correlation between this significant level of attention and those topics where the SVP is given greatest prominence compared with other parties. Primarily, the SVP is able to benefit from the significant attention paid to topics where a distinction is drawn between «us» and «them» and the «ruling elites» are failing, in other words where the relationship between Switzerland and foreign countries or organisations (e.g. Swiss/US tax scandal; the free movement of persons between Switzerland/EU; the SVP's immigration initiative) or minorities living in (or migrating to) Switzerland are treated as a problem (Asylum Act/Act on the Residence and Permanent Settlement of Foreign Nationals in practice; integration in practice) or even where supposed or actual failures to enforce the law (so-called «soft justice») occur (the Amelie, Carlos and Marie cases). Similarly, the significant attention devoted to the SVP's family initiative and the «Mörgeli case» at the University of Zurich illustrates how the SVP is at the centre of most of the communication events generating considerable attention within domestic politics. The Mörgeli case is also an instance of the «people in glass houses» effect, i.e. the tendency for affairs to become particularly newsworthy where the protagonists themselves preach the need for those performing duties within public institutions to meet especially high standards.

2. *Topic profile influences the level of attention attracted:* The significant media attention paid to the SVP is mainly attributable to its ability to find a place for «its» topics on the media agenda. This is borne out by various analyses, which single out for each party the three most attention-getting communication events where the respective party is being paid the most attention (see diagram 18). With the family initiative and the immigration initiative, the SVP has been able to dominate two communication events which are attracting significant media attention and which it has instigated itself. It is also attracting the most attention, ahead of all the other parties, in relation to the tax-row debate, even though the topic is not one the party itself actually tabled. By comparison, the SP is only able to raise its profile in the debate over executive pay; it may well be attracting more attention than the other parties when it comes

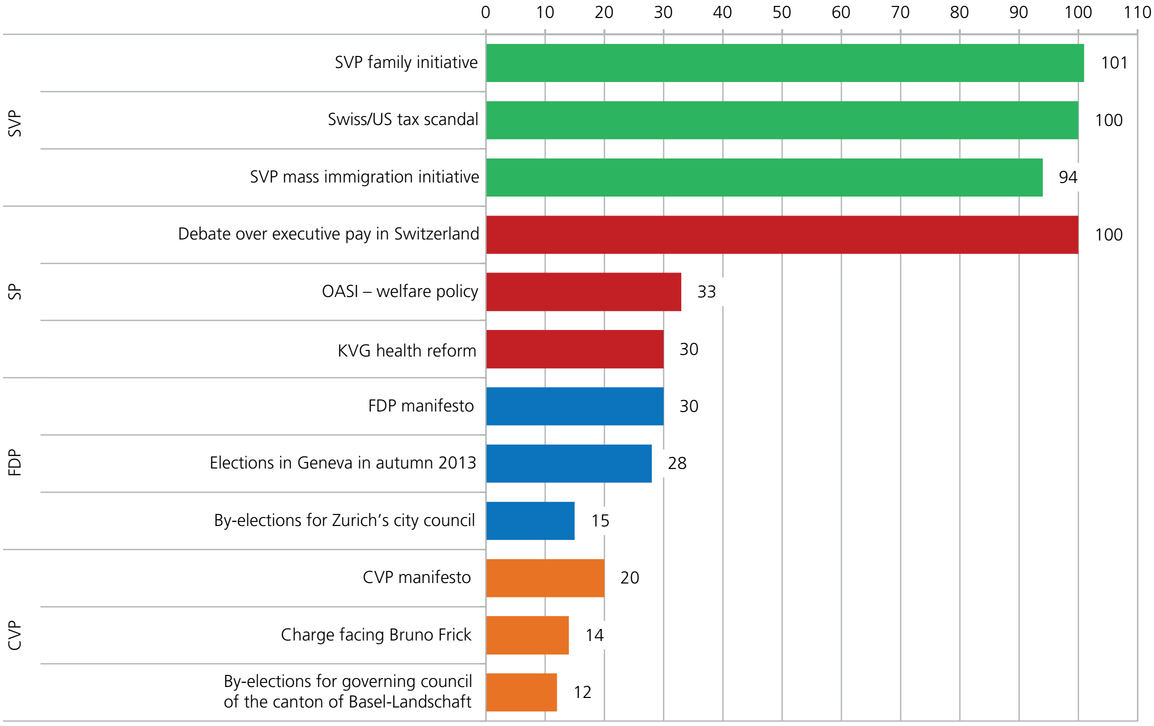


Diagram 18: Communication events paying the greatest attention to a political party

For 2013 as a whole and for each of the four main parties in Switzerland, the diagram shows the three communication events in which a particular party was mentioned the most, both relative to the other parties and in terms of absolute numbers of mentions. The investigation focused on the reporting on the front and home pages of 29 press and online outlets from German-speaking and French-speaking Switzerland (see Appendix 1: «Methodology», point 4). A record was made for each story of whether a party was mentioned at least once, i.e. there could be a maximum of seven mentions per story (seven parties). The attention paid to a given party for each communication event is based on its share of the overall mentions (n = 7,224 mentions).
Interpretation example: The FDP was paid the most attention of all parties (25%) relating to the communication event associated with the elections in Geneva in autumn 2013; in terms of absolute numbers of mentions, it was one of the three communication events with the most mentions for the FDP (25). Although the FDP was mentioned more often in connection with the debate over executive pay in terms of absolute numbers (40), for instance, the most attention associated with this communication event, which itself attracted a lot of attention, was paid to the SP (37%) and not the FDP (15%).

to OASI pension and healthcare reform, but this amounts to relatively little in absolute terms (based on the number of stories). As for the FDP and the Christian Democratic Party (CVP), it is striking that they only come to prominence in relation to topics associated with developments within these parties themselves (e.g. discussions regarding the manifesto, profile-raising strategies), with party electoral candidates (e.g. by-elections for Zurich's city council) or with problems involving party officials (e.g. the charge facing Bruno Frick, a former CVP member of the Council of States and now a member of the Board of Directors at Finma). These rather uneven opportunities to get attention are forcing parties to launch initiatives in order to attract the media spotlight and think in media terms when shaping their manifestos. The tabloidisation of the media is promoting the tabloidisation of politics.

3. *Dominance of the SVP:* In each of the media types studied across the press and online forms, the SVP is given the most attention. The attention paid to the SVP is well above average in the tabloid media (online and offline: 48% and 49%, respectively) and on the news sites of the subscription papers (43%). The subscription papers themselves (31%) and the Sunday/magazine type (27%) share the attention they pay to political parties rather more evenly across the individual parties. The free online and offline outlets

(30% and 31%, respectively) also tend to focus rather less on the SVP than the overall average for all media. At 37%, however, this level of attention given to the SVP is far higher across the board than its share of the vote at national level.

Conclusion – an overview of key aspects

The main results may be summarised as follows:

I Entertainment is outperforming information-based journalism in terms of advertising and sales revenue
II Reach is marginalising quality as far as journalism is concerned
III Quality is suffering at the «bottom» because there is no imperative to maintain it and at the «top» because it can no longer be provided
IV No let-up in concentration and growing business diversification
V Erosion of the professional culture of journalism
VI Loss of diversity and changes in terms both of the attention paid to topics and players and of agenda building

Looking at the various trends, it becomes clear that there are two areas of disparity in respect of finance (I, II), two in respect of quality (III, VI) and two in respect of structure and culture (IV, V) within the Swiss media system.

The significant loss of advertising revenue to non-journalistic offerings represents a threat to the very existence of information-based journalism. The old «marriage» between journalism and advertising is eroding before our eyes, although advertising remains the most important source of revenue for journalism. This external factor of the diminishing means available to the sector has been exacerbated, however, by an internal factor, namely the free culture initiated and reinforced by the sector itself, to such a degree that the emphasis on reach and the associated fixation on advertising revenue – literally at any price – is resulting in journalistic quality within information-based journalism being punished financially. Disregarding public service output, the clear losers of this structural change are those media types and outlets which aim to offer a brand of journalism of some relevance to a democracy. Media structures are under greatest threat at cantonal level. With the kind of journalism which aims to provide quality being eroded as a result of low-quality information-based journalism, quality levels within the media area are declining at both the top and the bottom. Across the board, the information we receive covers fewer relevant topics and includes fewer reports on politics, economy or culture where proper context is provided. At the same time, we are faced with a more distinct «two-class» society: a shrinking group of older recipients with a high level of income and education using higher-quality media on the one hand, compared with a significant increase in the consumption of lower-quality media by the majority of the population on the other. This development in terms of reach is changing the issue agenda for us and is determining, within the area of public communication, what receives attention and how much attention is paid to the various players. The reach-driven tabloidisation of the media is in turn driving the tabloidisation of politics, with both phenomena – through the associated decline in diversity, provision of context, rationality and relevance – undermining the role of public communication as a forum and a provider of criticism, legitimacy and social integration, which are essential to democracy.

This development is also a threat to professional journalism undertaken by editorial personnel. The culture of the profession, with its institutions, its mission to provide quality, and its very self-concepts – among both employers and employees – has largely lost its regulatory function in the face of apparently stifling market imperatives. The concept journalism has of itself, as a provider of good quality information for the general public, already degraded to such a degree that journalists are simply accepting that classified ads are no longer helping to finance journalism, that editorial staff and sections are being lost, that the end of one round of cost-cutting merely heralds the start of the next, that media companies are appointing people as «editors» to compose «listicles» and that journalists within their own media outlets are effectively providing advertising for third parties.

Both these trends – the loss of quality and the diminishing resistance within the professional culture and the sector against the metrification of journalism – are creating a social problem which concerns all users and therefore demands that media policy measures are taken for the sake of the common good. The Yearbook supports all discussions in this area and welcomes the brief summary of the status quo from the Federal Media Commission (FMEC).

Preview of the in-depth studies

Further «Studien Qualität der Medien» («Quality of the Media Studies» – SQM) are again being published in 2014. The series of «Reflexionen Qualität der Medien» («Reflections on the Quality of the Media» – RQM) was launched in 2014 as an adjunct to these studies. While the studies are a window for academic articles, the reflections are articles on developments within the media world and are mainly contributed by those actually working in the media. Both the studies and the reflections are available via the fög (www.foeg.uzh.ch) or Schwabe Publishers (www.schwabeverlag.ch).

The «Reflections» series for 2014 already includes an article entitled «Leisten Presseräte, was sie sollen und wollen?» («The role of press councils: what are they designed to do and what do they want to do?») by Peter Studer (lawyer/journalist; former President of the Swiss Press Council). Based on a comparative study of Sweden, Germany, the United Kingdom and Switzerland, the article assesses how far the respective press councils are able to stabilise the quality of the mass media, which is becoming marginalised.

The following studies are due to appear by early 2015:

- *Weniger ist weniger! Kopfblatt- und Mantelsysteme und ihre Auswirkungen auf die publizistische Vielfalt (Less is less! Sharing of content between local and national editions and its impact on journalistic diversity):* The Swiss media system is experiencing a massive process of concentration. The diversity both of media providers and of media outlets has reduced markedly since 2002 (see fög 2013, p. 86). The major media companies which remain are dividing up journalism sales areas between them and expanding the practice of local editions sharing content with national editions. As a result, editorial teams are being thinned out, there is a lack of clarity regarding responsibility for journalistic content, and diversity is being reduced. This study examines where and how severely the journalistic diversity of press offerings is being reduced as a result of integration into these kinds of network systems. To this end, the same reporting contents between newspapers within the same network systems are recorded to monitor the newspapers and sections where diversity of reporting is suffering the most under these kinds of collaborative systems.
- *Medienhypes – Der Fall «Carlos» (Media hypes – the «Carlos» case):* The media event surrounding the youth «Carlos», triggered by *Blick* during the late summer of 2013 with its campaign of outrage so typical of the tabloids, subsequently dominated reporting across the entire media system over a period of weeks. The Carlos case is just one example of a media hype where the traditional distinction between the topical agenda of the tabloid media and the information media which aim to provide quality is disappearing, because topics introduced «from the bottom» (i.e. by the low-quality media) are attracting intensive attention «at the top» as well (i.e. among the higher-quality media) in an environment where the emphasis is on reach. The study analyses the reporting philosophies associated with these kinds of media hypes on the basis of the scandal-mongering theory. Apart from looking at the choice of topics, it is also interesting, among other things, to look at which media take up, uncritically and without proper checks, reporting content which has little relevance (i.e. of a particularistic and voyeuristic nature) and which media follow the event in a critical and reflective manner as well as at a metacommunicative level.
- *Die Politikberichterstattung der Presse im Wandel: Von Kür und Pflicht zu Hypes und SDA? (A period of flux for political reporting in the press: from free and compulsory to hypes and the Swiss News Agency?)* The press continues to represent the most sustainable and comprehensive means of engaging with politics in the federalist country of Switzerland, as well as achieving the greatest overall reach in this area. It is indispensable to any serious opinion-forming process within a democracy. The editorial structures still associated with the subscription press must therefore be preserved, as must journalistic expertise – regardless of the form of communication concerned. However, what is on offer in this area has undergone fundamental change in Switzerland. Party newspapers, following their many years of dominance, have largely disappeared with the exception of the renaissance engineered by some right-wing conservative players. At the same time, tabloid

journalism has expanded way beyond its once limited niche and new types of print media have entered the scene in the form of Sunday and free papers. A further development has been the tremendous shake-up within the business model associated with the information-based press in Switzerland. The study examines how political reporting within major outlets across all four print media types (subscription press, Sunday and magazine press, free press, tabloid press) has changed over the last 50 years in both German-speaking and French-speaking Switzerland. The focus is on the scope of political reporting and the sections involved, as well as the quality of political reporting as measured against such indicators as relevance, rationality and provision of context.

- *Qualität der Selbstthematisierung – Verlagshäuser als Medienthema (Quality of self-reporting – when publishing houses become a media topic):* In light of the declining quality of information-based journalism in Switzerland (see fög 2013), it is worth considering the impact of this erosion of quality on the level of self-reflection within information-based journalism. What does information-based journalism have to say about itself in terms of its structures and what it has to offer? There is an assumption that the commercialisation and concentration within the media are affecting their capacity for critical reporting about themselves, because commercial issues are marginalising journalistic issues as far as self-reporting within the media is concerned, while the declining diversity of providers is reducing any appetite for mutual criticism. In order to test this thesis, a quality analysis is conducted in respect of reporting about the publishing houses *Tamedia*, *Ringier* and *NZZ-Mediengruppe*. The focus is on the following issues, among others: is there journalistic independence from the respective controlling parties within individual media outlets or do these individual interests result in a rather «panegyric» style of reporting about the home publishing house? Where and to what extent is there evidence of (un-) critical reporting about rival publishing houses too? What is the ratio of commercial «performance-related» content to journalistic content relating to the publishing houses? How much attention is devoted to topics which might damage the publishing houses' reputations (such as redundancies or programmes of savings and cutbacks)?
- *Medienqualität und erhöhte Reputationsvolatilität in der Ökonomie (Media quality and the increase in reputational volatility within the economy):* Reporting on the economy is undergoing some fundamental changes, switching focus from the macro level, where the emphasis is on content relating to the economic situation, economic policy or the national economy, to the meso level (individual companies) and micro level (individual people) (see the 2010-2 study: «Wirtschaftsberichterstattung in der Krise» («Economic reporting in a state of crisis»). This meso- and micro-level reporting about the corporate world tends to alternate between uncritical, PR-driven «performance-related» reporting and scandal-mongering denunciation of moral failings (see the 2011-4 study: «Einfluss von PR in der Unternehmensberichterstattung» («Influence of PR on reporting about the corporate world»). This study examines the impact of this change within the media on how companies' reputations are shaped. One aspect highlighted is how the change in reporting about the corporate world has made reputations more volatile. The greater the decline in reporting quality, the quicker the succession of uncritical, euphoric reports about companies alternating with scandal-mongering reports.

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The mark of the printing and publishing house Schwabe, founded in 1488, dates back to the very beginnings of the art of printing and derives from the circle of artists around Hans Holbein. It is the printer's mark of the Petris, and illustrates Jeremiah 23:29: "Is not my word like as a fire? saith the LORD; and like a hammer that breaketh the rock in pieces?"

Qualität der Medien – Studien und Reflexionen erscheinen als periodische Einzelpublikationen

Studien Qualität der Medien
Schweiz – Suisse – Svizzera

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Die Studien von 2010 bis 2012 finden sich auch im Jahrbuch Qualität der Medien des jeweiligen Jahrgangs.

Jens Lucht, Linards Udris: **Kommerzialisierung und Konzentration der Medien im internationalen Vergleich.** SQM 1/2013. 32 Seiten. PDF eBook. ISBN 978-3-7965-3231-3. Ca. sFr. 12.– / € (D) 10.50 / € (A) 10.50.

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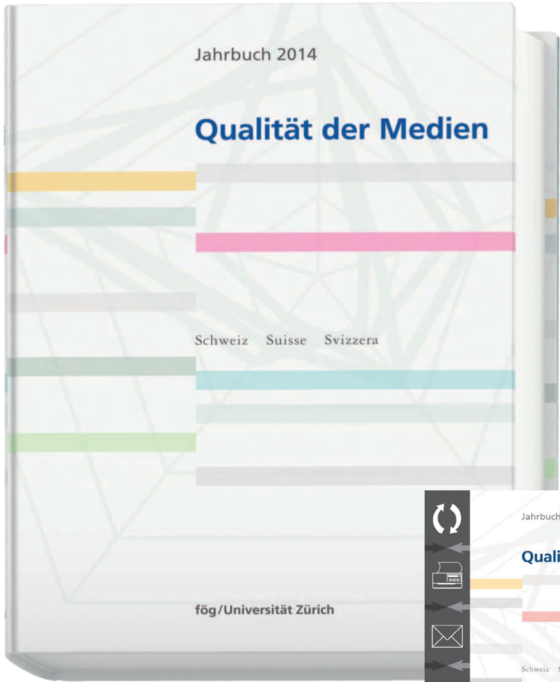

Die Qualität der Medien in der Schweiz

Das Jahrbuch erscheint in diesem Jahr zum fünften Mal. Damit kann die Qualitätsentwicklung von rund 50 verbreitungsstarken Medientiteln aus der Deutschschweiz, der Suisse romande und der Svizzera italiana zwischen 2010 und 2013 aufgezeigt werden. Berücksichtigt werden Informationsmedien aus den Gattungen Presse, Radio, Fernsehen und Online, die für die öffentliche Kommunikation in der Demokratie unverzichtbar sind.

Neben der inhaltlichen Qualitätsbewertung der untersuchten Informationsmedien wird auch in diesem Jahr die publizistische Versorgung in den drei grossen Sprachregionen untersucht. Hier interessiert, wie sich – angesichts zunehmender Strukturprobleme – die Zahl und die Verbreitung der Medientitel, die Werbeflüsse sowie die Konzentration in den sprachregionalen Märkten kurz- und langfristig verändern. Ein Schwerpunkt bildet in diesem Jahr die Erörterung der verschiedenen Investitions- und Geschäftsmodelle, mit denen die Medienbranche versucht, auf die strukturelle Medienkrise zu reagieren.

Parallel zum *Jahrbuch* erscheinen laufend die eJournals *Studien Qualität der Medien* und *Reflexionen Qualität der Medien*.

Bis zum Frühjahr 2015 sind folgende Studien geplant:

- *Weniger ist weniger! Kopfblatt- und Mantelsysteme und ihre Auswirkungen auf die publizistische Vielfalt*. Untersucht wird, inwiefern die Kooperationssysteme von Schweizer Medienhäusern die publizistische Vielfalt beeinträchtigen.
- *Medienhypes – Der Fall «Carlos»*. Was passiert, wenn immer mehr von Boulevardmedien angestossene «Skandale» aus Resonanzgründen auch von qualitativ höher stehenden Informationsmedien aufgegriffen werden?
- *Die Politikberichterstattung der Presse im Wandel: Von Kür und Pflicht zu Hypes und SDA?* Die Studie analysiert, wie sich Ort, Umfang und Qualität der Politikberichterstattung in den vier Pressetypen (Abonnement, Sonntag und Magazine, Gratis, Boulevard) der deutsch- und französischsprachigen Schweiz während der letzten 50 Jahre gewandelt haben.
- *Die Qualität der Selbstthematisierung – Verlagshäuser als Medienthema*. Wie thematisiert der Informationsjournalismus selbst seine Leistungen und die Strukturen, in denen diese erbracht werden?
- *Medienqualität und erhöhte Reputationsvolatilität in der Ökonomie*. Analysiert wird der Strukturwandel in der Wirtschaftsberichterstattung: Der Akzent auf konjunkturelle, wirtschaftspolitische und volkswirtschaftliche Inhalte verschiebt sich zu einer unternehmens- und personenzentrierten Berichterstattung. ■

Das Jahrbuch *Qualität der Medien – Schweiz Suisse Svizzera* wird erarbeitet durch das *fög – Forschungsinstitut Öffentlichkeit und Gesellschaft / Universität Zürich* (www.foeg.uzh.ch). Es wird gefördert durch die Stiftung *Öffentlichkeit und Gesellschaft* (www.oeffentlichkeit.ch). Sein Ziel ist es, das Qualitätsbewusstsein für die Medien in der Schweiz zu stärken. Das Jahrbuch bietet eine grundlegende Informationsquelle für Medienschaffende, Führungskräfte aus Politik und Wirtschaft, Wissenschaftler und alle Interessierten, die sich mit der Entwicklung traditioneller wie neuer Informationsmedien und deren Inhalten auseinandersetzen wollen.

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